



## Person Model *Sponsor Training*



**LincPass**  
simple. smart. secure.



## Person Model Sponsor Training Modules

This training covers the processes of Person Model Sponsorship:

Module A: Getting Started *(Required)*

Module B: Finding or Creating a Company/Organization *(Optional)*

Module C: Finding or Creating a Contract, Grant or Agreement *(Required)*

Module D: Finding or Creating a Person Information Record *(Required)*

Module E: Adding a New POI Type and Maintaining Organizational Relationships *(Required)*

Module F: Sponsorship *(Required)*

Module G: USAccess Sponsorship Actions *(Required)*

These modules will guide you step-by-step through the process to enter required information for Person Model Sponsorship.



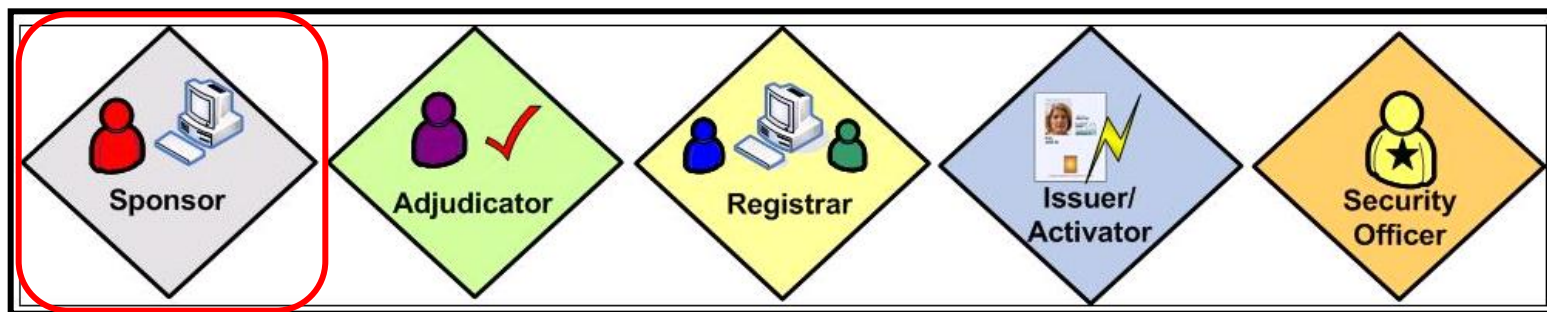
## Introduction

Welcome to the Person Model Sponsor training. Identity management has become an important part of our homeland security and it directly affects you.

Homeland Security Presidential Directive 12 (HSPD-12) established the criteria for an interoperable, Personal Identity Verification (PIV) program within the federal government.

Your role as a Sponsor is vitally important to the security of the nation, its assets, and its people. Each of us has an important personal role to fulfill in the credentialing process. By establishing an identity verification chain of trust, we will be working together to achieve a safer work environment and homeland.

The USDA PIV Credential is called the LincPass. As a Sponsor, you will play a part in the process for Non-Employees to enroll for a LincPass so they can access facilities and systems.

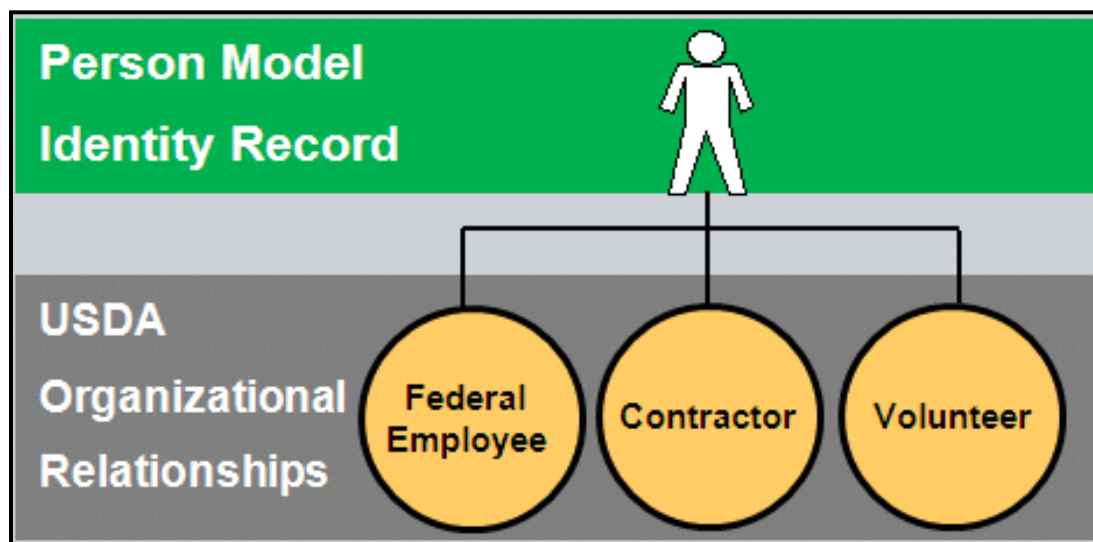




## What is Person Model?

Person Model is USDA's database for storing and maintaining personnel identity records. Person Model maintains a single identity record for each person, and tracks the history of each relationship the person has with USDA over time.

For example, a USDA Federal employee who works for NRCS may also be a Volunteer with the Forest Service. Alternatively, a person who previously performed under a contractual agreement with USDA as a Contractor may become a Federal employee.





## What are the benefits of Person Model?

- Payroll Personnel agencies no longer need to use two systems (NEIS and USAccess) to sponsor and adjudicate non-employees. All work will be completed in the Person Model.
- For each applicant, Sponsors will be able to view the non-employee's organizational relationship history on one screen instead of searching for individual contract assignments.
- The Person Model maintains a single identity for each person, resulting in less data entry for applicants who have a previous history with USDA, such as former Federal employees.
- Former Federal employees can now be successfully credentialed as non-Federal employees.
- Data fields accommodate all non-employee types instead of being contract-specific.





## What is a Non-Employee?

A non-employee is person who provides a service to USDA but is not a Federal Employee. Many different types of Non-Employees support USDA.

In Person Model, there are five options to represent the various Non-Employee types. Options include:

- Contactors
- Affiliates
- Fellows
- Interns
- Volunteers

Non-employees who are marked “Contractor” in Person Model will receive a Contractor LincPass with a green stripe, as shown in the top image on the right.

All others – Affiliates, Fellows, Interns, and Volunteers– will receive an “Associate Dignitary” LincPass with a white stripe, as shown in the bottom image on the right.





## The Sponsor Role

The Sponsor must be a U.S. Government official. The Sponsor is assigned to this role by the Agency Role Administrator in the USAccess portal. You must receive USAccess Sponsor training and be USAccess-certified before you can be assigned the Sponsor role in USAccess.

**If a Sponsor is not properly designated in USAccess, any sponsorships performed in Person Model will be marked as incomplete in USAccess.**

Some of the data entry duties included in the Sponsor role may be delegated to Data Entry personnel, but the Sponsor must be the official person to authorize LincPass issuance.

The following is an overview of the Sponsor's duties:

1. Initiate the sponsorship process
2. Perform data entry
3. Sponsor non-employees
4. Maintain current information in Person Model

We will discuss these duties in more detail on the next slide.



## Sponsorship Procedures

### 1. Initiate the Sponsorship Process:

The Sponsor identifies non-employees who require a LincPass.

### 2. Perform Data Entry:

The Sponsor ensures completion of initial data entry required for LincPass issuance in Person Model, which includes company/organization information, contract/grant/agreement information, and non-employee information.

### 3. Sponsor Non-Employees:

The Sponsor enters sponsorship information in Person Model.

### 4. Maintain Current Information in Person Model

The Sponsor updates Person Model records with any new information, such as updating periods of performance or recording name changes for applicants.

### 5. Perform Sponsorship Duties in USAccess:

The Sponsor may perform functions in USAccess as needed, such as requesting card reprints/reissues, resending email notifications, or running reports.





## Sponsorship Prerequisites

To begin Sponsorship duties, you must meet the following requirements:

- **USAccess** *(not required for Data Entry Personnel)*:
  - Completed the USAccess Sponsor training
  - Designated as a Sponsor in USAccess by your Agency Role Administrator
  - Have a User ID and password for USAccess
- **Person Model**:
  - Completed Person Model Sponsor training and passed the Person Model Sponsorship test
  - Have access to Person Model and have a User ID and password
- **Non-Employee Information**:
  - Have Personally Identifiable Information (PII) for the non-employee
  - Have a contract/grant/agreement number that will be assigned to the non-employee and know the period of performance dates



## Defect Problem Report (DPR) references

Throughout this training module, you will see references to Defect Problem Reports (DPRs) that have been submitted to NFC. This indicates that a change request has been submitted for that screen, field or system function and is still in development.

For example, there may be a field name or menu item that will be changed in the future, or a known issue that will be resolved upon system release. These DPRs are marked throughout the presentation.

Any changes due to pending DPRs will be updated in the final version of the training.



## Module A: Getting Started (Required)

The next few screens show you how to log in to and navigate Person Model. Only a Federal employee may have access to Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module A: Getting Started (Required)

**USDA** United States Department of Agriculture  
National Finance Center

**EMPOWERHR**  
SOLUTIONS  
FROM HIRE TO RETIRE

**WARNING**

\* You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

\* Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

\* By using this information system, you understand and consent to the following:

- \* You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
- \* Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
- \* Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

**I AGREE to the above** **A-1**


I DO NOT agree to the above

[Accessibility Statement](#) | [Privacy Policy](#) | [Non-Discrimination Statement](#) | [USA.gov](#) | [White House](#)


**Step A-1.** Open a web browser to the following address: <https://icams.usda.gov>. A warning screen will display. Click **I AGREE to the above** to move to the next screen, which will have login fields.



## Module A: Getting Started (Required)



United States Department of Agriculture  
National Finance Center



**WARNING**

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\* You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

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- \* Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
- \* Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

User ID:

Password:

**A-2**

[Did you forget your password?](#)

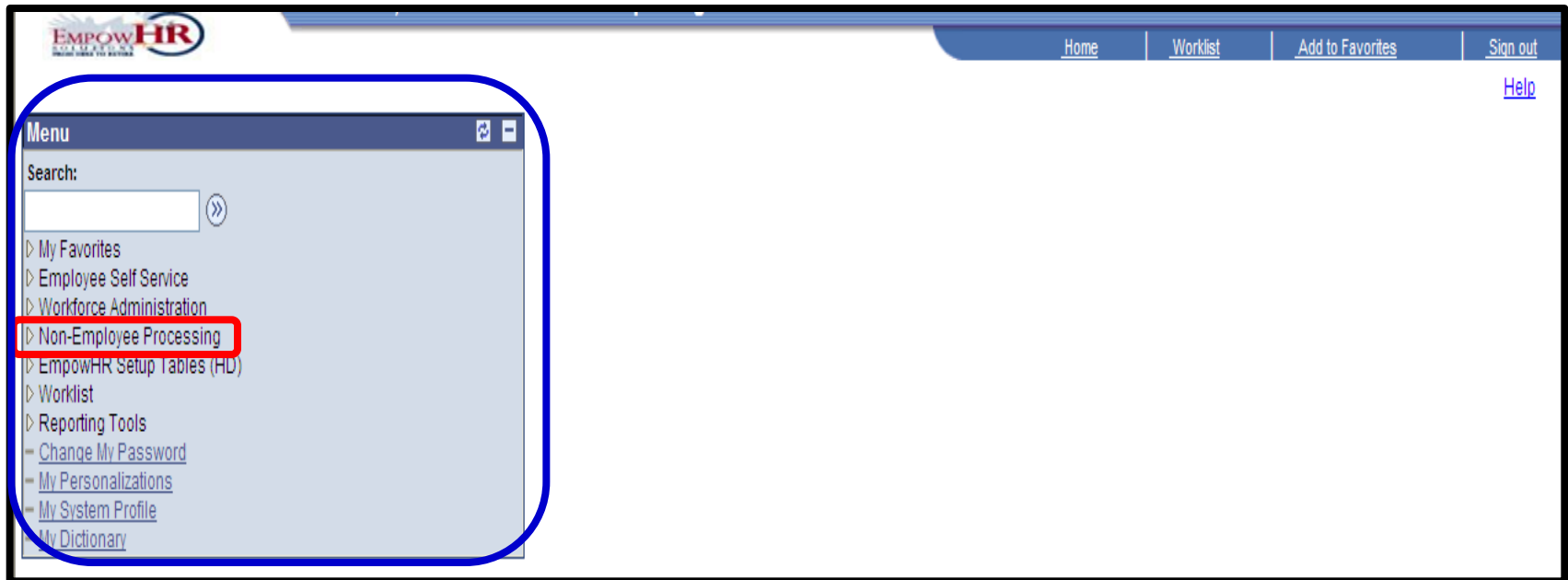
[Accessibility Statement](#) | [Privacy Policy](#) | [Non-Discrimination Statement](#) | [USA.gov](#) | [White House](#)

**Step A-2.** Sign in to Person Model with your **User ID** (Required) and **Password** (Required).





## Module A: Getting Started (Required)



A-3

Once you are logged in to the system, you will be directed to the home page. The left-side navigational menu links you to the required processes.

**Step A-3.** Click the **Non-Employee Processing** link.



## Module A: Getting Started (Required)

**Menu**

Search:

- My Favorites
- Employee Self Service
- Workforce Administration
- Non-Employee Processing**
  - NEIS Reports
    - Person Information
    - Add a New Relationship
    - Maintain a Persons Assignment
    - Person Organizational Summary
    - Company/Organization
    - Contract Information
- EmpowHR Setup Tables (HD)
- Worklist
- Reporting Tools
  - Change My Password
  - My Personalizations
  - My System Profile
  - My Dictionary

**Main Menu >**

**Non-Employee Processing**

- NEIS Reports**  
NEIS Reports
- Person Information**  
Modify a person's basic information, such as name and contact information.
- Add a New Relationship**  
Attach a new person-of-interest type to an existing person.
- Maintain a Persons Assignment**  
Maintain the information for a person-of-interest without jobs.
- Person Organizational Summary**  
View a summary of all the organizational relationships for a person.
- Company/Organization**  
Company/Organization
- Contract Information**  
Contract Information

**DPR: "NEIS" references to be removed from all screens, menus, and field names.**

**DPR: Menu items, screen headings and field names will be generic and will not be contract-specific**

**DPR: Help link and User Guide to be added.**

The Non-Employee Processing menu will expand to show all menu options pertaining to your role, as well as icons in the center of the page.

To perform actions in Person Model, you can either click on a **link** from the left-side navigational menu, or click the corresponding **icon** in the center of the page.



## Module A: Getting Started (Required)

You should have access to all/some of the following Non-Employee Processing functions located in the left-side navigational menu depending on your role(s).

- Reports (all roles)
- Person Information (all roles; Sponsor has read-only access)
- Add a New Relationship (data entry)
- Maintain a Person's Assignment (data entry)
- Person Organizational Summary (all roles)
- Company/Organization (data entry)
- Contract Information (data entry)

Note: Sponsors who also have Data Entry capabilities will have full read/write/edit access to Person Information screens.





## Module B: Finding or Creating a Company/Organization (Optional)

In Person Model, entering Company/Organization Information is optional. While Company/Organization Information is not required, it is recommended to enter as much information as possible. This information can be helpful for reporting and organizational purposes.

The next few screens show you how to create a Company/Organization record in Person Model (or verify that it is already in the system). Only a Federal employee may create or edit Company/Organization Information records in Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module B: Finding or Creating a Company/Organization (Optional)

**B-1**

The screenshot displays the EmpowHR system interface. On the left, a 'Menu' sidebar is visible with a search bar and a list of navigation options. The 'Non-Employee Processing' option is expanded, and the 'Company/Organization' link is highlighted with a red rectangular box. To the right of the sidebar, the main content area shows the 'Non-Employee Processing' menu. This menu includes several sub-sections: 'NEIS Reports' (with links for Location Report, Non Employee Process, Period of Performance Report, and Summary Report), 'Person Information' (with a link to Modify a person's basic information), 'Add a New Relationship' (with a link to Attach a new person-of-interest type), 'Maintain a Persons Assignment' (with a link to Maintain the information for a person-of-interest without jobs), 'Person Organizational Summary' (with a link to View a summary of all the organizational relationships for a person), and 'Company/Organization' (with a link to Company/Organization). The 'Company/Organization' link is also highlighted with a red rectangular box.

**Step B-1.** From the Non-Employee Processing menu, select **Company/Organization**. You can find an existing Company/Organization record in the system or add a new one.





## Module B: Finding or Creating a Company/Organization (Optional)

B-2

**Company/Organization**  
Enter any information you have and click Search. Leave fields blank for a list of all values.


**Find an Existing Value** [Add a New Value](#)

DUNS:  begins with

Company:  begins with

Company Name:  begins with  test

☐ Include History ☒ Correct History ☐ Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

DPR: Wild Card (blank) searches to be disallowed throughout the system.

**Step B-2.** To find an existing Company/Organization, click on the **Find an Existing Value** tab. Enter the search terms to narrow your results.

**Note:** **DUNS** only applies to Contracting Companies, not Organizations. DUNS is a 9-digit or 9-digit +4 number unique identifier for a Company. **Company** (three-character code) is masked.



## Module B: Finding or Creating a Company/Organization (Optional)

The screenshot shows the EmpowHR system interface. On the left is a 'Menu' sidebar with a search bar and a list of navigation items. The 'Company/Organization' item is highlighted. The main content area is titled 'Company/Organization' and includes instructions to enter information and click 'Search'. There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs are input fields for 'DUNS', 'Company', and 'Company Name', each with a 'begins with' dropdown menu. There are also checkboxes for 'Include History', 'Correct History' (checked), and 'Case Sensitive'. Below these are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'. The 'Search Results' section shows a table with two columns: 'DUNS' and 'Company Name'. The first row is highlighted with a red box and contains the text '321654987 Testing2' under 'DUNS' and 'B-3' under 'Company Name'. Below the table are links for 'Find an Existing Value' and 'Add a New Value'.

**Menu**

Search:

- My Favorites
- Employee Self Service
- Workforce Administration
- Non-Employee Processing
  - NEIS Reports
    - Person Information
    - Add a New Relationship
    - Maintain a Persons Assignment
    - Person Organizational Summary
  - Company/Organization**
    - Contract Information
- EmpowHR Setup Tables (HD)
- Set Up HRMS
- Worklist
- Reporting Tools
  - Change My Password
  - My Personalizations
  - My System Profile
  - My Dictionary
  - EmpowHR Documentation

**Company/Organization**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

DUNS: begins with [ ]

Company: begins with [ ]

Company Name: begins with [ ] Test

☐ Include History ☒ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

**Search Results**

View All First 1-2 of 2 Last

DUNS	Company Name
321654987 Testing2	B-3
987654321 testtesttest	

Find an Existing Value | Add a New Value

**Note:** If the search yields multiple records that match the search criteria, only the first 300 records will display. If you do not see the DUNS or Company Name hyperlink from the list of search results, you may now enter a new record (covered on slide 21).

**Step B-3.** Select the applicable hyperlink from the list of search results.



## Module B: Finding or Creating a Company/Organization (Optional)

B-4

**Company/Organization**

**Company/Organization Details**

\*Company/Org

DUNS

\*Company Name

Entered by NEISTA01 Account, Test

\*Contact Name

\*Contact Phone #

**Company/Organization Address**

\*Address Line 1

Address Line 2

\*City

\*State

Postal Code

B-5

**Step B-4.** Make sure the yellow Correct History button is selected on the bottom right to make any changes to an existing record.

**Note: Company and DUNS:** These fields are masked and do not permit data entry updates.

**Step B-5.** Click the **Save** button to save information entered.



## Module B: Finding or Creating a Company/Organization (Optional)

**Company/Organization**  
Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value | **Add a New Value** **B-6**

DUNS: begins with

Company: begins with

Company Name: begins with

☐ Include History ☒ Correct History ☐ Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Step B-6.** To add a new Company/Organization, click the **Add a New Value** tab.



## Module B: Finding or Creating a Company/Organization (Optional)

### Company/Organization

[Find an Existing Value](#)[Add a New Value](#)

**DUNS:**

**B-7**

Company:

Company Name:

[Find an Existing Value](#) | [Add a New Value](#)

**Note:** To add a new record, you can enter any information you have on this screen, or simply leave the fields blank and click **Add** to enter all details on the next screen. Any information you enter on this screen will be populated on the Company/Organization detail page.

**Step B-7. DUNS:** Enter the **DUNS** for the Contracting Company, or click **Add** to enter information on the detailed Company/Organization record. DUNS is a 9-digit unique identifier for the Company. You may also enter a 9-digit +4 number used to identify a specific unit within a larger entity.





## Module B: Finding or Creating a Company/Organization (Optional)

B-8

### Company/Organization

[Find an Existing Value](#)[Add a New Value](#)

DUNS:

Company:

Company Name:

Add

[Find an Existing Value](#) | [Add a New Value](#)

**Note:** The **Company** field is masked and does not permit data entry.

**Step B-8. Company Name:** Enter the **Company Name** on this screen, or click **Add** to enter information on the detailed Company/Organization record. Person Model will direct you to a new page where you can add additional information.



## Module B: Finding or Creating a Company/Organization (Optional)

You will now learn how to enter data for a new Company/Organization record.


The screenshot to the right shows a blank Company/Organization record. The slides that follow will show small subsets of this record.

The minimum required fields to save a Company/Organization record are:


- Company/Org
- DUNS (if company selected)
- Company Name
- Contact Name
- Contact Phone
- Address Line 1
- City
- State







### Company/Organization

**Company/Organization Details**

*Company/Org	<input type="text" value=""/> 
DUNS	<input type="text" value=""/>
*Company Name	<input type="text" value=""/>
Entered by	DATA_ENTRY DATA_ENTRY
*Contact Name	<input type="text" value=""/>
*Contact Phone #	<input type="text" value=""/>

**Company/Organization Address**

*Address Line 1	<input type="text" value=""/>
Address Line 2	<input type="text" value=""/>
*City	<input type="text" value=""/>
*State	<input type="text" value=""/> 
Postal Code	<input type="text" value=""/>

 Save  Notify  Add  Update/Display  Include History  Correct History



## Module B: Finding or Creating a Company/Organization (Optional)

B-9

**Company/Organization**

**Company/Organization Details**

\*Company/Org    
DUNS

\*Company Name

Entered by DATA\_ENTRY DATA ENTRY

\*Contact Name

\*Contact Phone #

**Company/Organization Address**

**Note:** Any information you entered on the previous screen will be populated on the Company/Organization detail page.

**Step B-9. Company/Org:** (Required). Select an option from the drop-down list. Options are **Company** or **Org**. If you choose Org, the **DUNS** field will be masked to prevent user data entry, and will be auto-populated with a system-generated number upon saving the record.



## Module B: Finding or Creating a Company/Organization (Optional)

B-10

### Company/Organization

Company/Organization Details

\*Company/Org

Company

▼

DUNS

123456789

\*Company Name

Entered by

DATA\_ENTRY

DATA\_ENTRY

\*Contact Name

\*Contact Phone #

Company/Organization Address

**Step B-10. DUNS:** If you selected Company in the previous step, enter **DUNS** for the Contracting Company on this screen. DUNS is a 9-digit unique identifier for the Company. You may also enter a 9-digit +4 number used to identify a specific unit within a larger entity.

If you selected Org, this field will be masked to prevent user data entry, and will be auto-populated with a system-generated number upon saving the record.

**Note:** A DUNS Number uniquely identifies a Contract Company, therefore the system will check to ensure there is no duplication of DUNS numbers within the system.



## Module B: Finding or Creating a Company/Organization (Optional)

B-11

### Company/Organization

Company/Organization Details

\*Company/Org

Company

DUNS

123456789

\*Company Name

Test Company

Entered by

DATA\_ENTRY

DATA\_ENTRY

\*Contact Name

\*Contact Phone #

Company/Organization Address

**Step B-11. Company Name:** Enter the name of the **Company/Organization** and click **Add**.

**Note:** The **Entered by** field is pre-populated with the User ID of the person logged in.





## Module B: Finding or Creating a Company/Organization (Optional)

### Company/Organization

#### Company/Organization Details

*Company/Org	Company
DUNS	123456789
*Company Name	Test Company
Entered by	DATA_ENTRY DATA_ENTRY
*Contact Name	Duck,Daffy
*Contact Phone #	891/578-9642

#### Company/Organization Address

B-12

B-13

**Step B-12. Contact Name:** (Required) Enter the **Name** of the point of contact for the Company/Organization in the following format: Last name,First name. Example: Smith,Bob.

**Step B-13. Contact Phone #:** (Required) Enter the **Phone Number** for the Company/Organization. Acceptable formats are as follows: 9999999, 999-9999, 9999999999, 999/999-9999



## Module B: Finding or Creating a Company/Organization (Optional)


B-14

**Company/Organization Address**







\*Address Line 1 123 MAIN ST.

Address Line 2 SUITE 1200

\*City ORLANDO

\*State FL  Florida

Postal Code 32825

 Save  Notify  Add  Update/Display  Include History  Correct History

B-15

**Step B-14. Company/Organization Address:** Enter the Address for the **Company/Organization**. **Address Line 1**, **City**, and **State** are required. Use the lookup function to locate the **State**, or key in the two-letter abbreviation. **Address Line 2** and **Postal Code** are optional.

**Step B-15.** Click **Save**.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

Congratulations! You have just learned how to find, enter, and save a Company/Organization record in Person Model.

The next few screens show you how to create a Contract, Grant or Agreement record in Person Model (or verify that it is already in the system). Only a Federal employee may create or edit Contract, Grant or Agreement records in Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

DPR: "Contract Information/Info" to be renamed "Contract/Grant/Agreement."

The screenshot displays the EmpowHR system interface. On the left is a navigational menu with the following items: My Favorites, Employee Self Service, Workforce Administration, Non-Employee Processing, NEIS Reports, Person Information, Add a New Relationship, Maintain a Persons Assignment, Person Organizational Summary, Company/Organization, **Contract Information** (highlighted), EmpowHR Setup Tables (HD), Set Up HRMS, Worklist, Reporting Tools, Change My Password, My Personalizations, My System Profile, My Dictionary, and EmpowHR Documentation. A red arrow points from the text box on the left to the 'Contract Information' menu item. Another red arrow points from the 'Contract Information' menu item to the 'Find an Existing Value' button in the main content area. The main content area is titled 'Contract Information' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this instruction are two buttons: 'Find an Existing Value' (highlighted with a red box and labeled 'C-1') and 'Add a New Value'. The search form includes fields for Number, Company, Sub-Agency, DUNS, and Company Name, each with a 'begins with' dropdown menu. There are also checkboxes for 'Include History', 'Correct History' (checked), and 'Case Sensitive'. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the buttons are links for 'Find an Existing Value' and 'Add a New Value'.

**Step C-1.** From the left-side navigational menu, select **Contract Information** to go to the Contract Information main menu. From here, you can search for existing Contract, Grant or Agreements records or add a new one.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-2

**Contract Info**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** [Add a New Value](#)

Number:    
Company:   
Sub-Agency:    
DUNS:    
Company Name:

☐ Include History ☒ Correct History ☐ Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

**Step C-2.** To search for an existing **Contract/Grant/Agreement** record, select the “**Find an Existing Value**” tab. Enter any information you have in the search terms and click “**Search**.”

**Note:** The **Number** field is a unique identifier for the Contract, Grant or Agreement, such as a PIID, Contract ID, or MOU number.





## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

**Contract Information**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Number:

Company:

Sub-Agency:

DUNS:

Company Name:

☐ Include History ☒ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Search Results**  
View All First 1 of 1 Last

Number	Sub-Agency	DUNS	Company Name
<a href="#">TEST</a>	<a href="#">11</a>	<a href="#">000000009</a>	<a href="#">Test For You</a>

C-3

**Note:** If the search yields multiple records that match the search criteria, only the first 300 records will display. If you do not see the Contract/Grant/Agreement listed, you may now enter a new record (covered on slide 36).

**Step C-3.** To verify and/or update an existing Contract/Grant/Agreement record , select the applicable hyperlink from the list of search results and proceed to the next slide.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

**Step C-4.** Make sure the yellow Correct History button is selected to make any changes to an existing Contract/Grant/Agreement Information record. You may now begin to update the record with any new information, such as a change in the Period of Performance.

**Note:** The **Type** and **Number** fields will be masked and will not permit data entry updates.

**Step C-5.** Click the **Save** button to save information entered.

**Contract/Grant/Agreement Information**

\*Type:

\*Number:

Contract Description:

\*Sub Agency:  Forest Service

\*Period of Performance Start Date:

\*Period of Performance End Date:

\*USDA POC:

Security Office Identifier:

Submitting Office Number:

OPAC/ALC Number:

Notes:

**Company/Organization Information**

DUNS:

Company/Organization Name:

POC Address Line 1:

POC Address Line 2:

POC City:

POC State:  Mississippi

POC Postal Code:  Country: USA

POC Phone Number:

**C-5**       **C-4**



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)


**Contract Info**


[Find an Existing Value](#) **Add a New Value** **C-6**

**C-7**

Number:

Company:

Sub-Agency:  

DUNS:  

Company Name:

**Add**

[Find an Existing Value](#) | [Add a New Value](#)

**Step C-6.** To add a new Contract, Grant or Agreement record, click the **Add a New Value** tab.

**Step C-7.** You will be prompted to enter the **Number, Sub-Agency, DUNS, and Company Name**. Any information you enter will be populated on the next screen. If you prefer, you can simply click the **Add** button to start with a blank record (covered on the next slide).

When you have finished entering information on this screen, click the **Add** button.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

You will now learn how to enter data for a new Contract/Grant/Agreement record.

The screenshot to the right shows a blank Contract/Grant/Agreement record. The slides that follow will show small subsets of this record.

The minimum required fields to save a Contract/Grant/Agreement record are:

- Type
- Number
- Sub-Agency
- Period of Performance Start Date
- Period of Performance End Date
- USDA POC

### Contract/Grant/Agreement Information

\*Type:

\*Number:

Contract Description:

\*Sub Agency:

\*Period of Performance Start Date:

\*Period of Performance End Date:

\*USDA POC:

Security Office Identifier:

Submitting Office Number:

OPAC/ALC Number:

Notes:

### Company/Organization Information

DUNS:

Company/Organization Name:

POC Address Line 1:

POC Address Line 2:

POC City:

POC State:

POC Postal Code:

Country:

POC Phone Number:

Save

Notify

Add

Update/Display

Include History

Correct History



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-8

**Contract/Grant/Agreement Information**

\*Type:   
Contract  
Grant/Agreement

\*Number:

Contract Description:

\*Sub Agency:

\*Period of Performance Start Date:

\*Period of Performance End Date:

**Step C-8. Type:** (Required) Select an option from the drop-down list. Options include **Contract** or **Grant/Agreement**.





## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-9

### Contract/Grant/Agreement Information

*Type:	<input type="text" value="Contract"/>
*Number:	<input type="text" value="ABC-12345"/>
Contract Description:	<input type="text"/>
*Sub Agency:	<input type="text"/>
*Period of Performance Start Date:	<input type="text"/>
*Period of Performance End Date:	<input type="text"/>
*USDA POC:	<input type="text"/>

**Step C-9. Number:** (Required) Enter the **Number** of the Contract, Grant or Agreement. This may be the PIID/Contract ID, MOU number, or other unique identifier.




## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)


**Contract/Grant/Agreement Information**


\*Type:


\*Number:

**C-10** \*Contract Description:

**C-11** \*Sub Agency:  

\*Period of Performance Start Date:  

\*Period of Performance End Date:  

\*USDA POC:  

**Step C-10. Contract Description:** (Optional) Enter a **description** of the work being performed on the Contract, Grant or Agreement, for example, "Cafeteria," or "Help Desk."

**Step C-11. Sub Agency:** (Required) This is the Sub-Agency that is sponsoring the non-employee. If you know the Sub-Agency code, enter it here. You may use the look up feature (magnifying glass) to select the Sub-Agency code. The Sub-Agency lookup will direct you to another screen where you can select a Sub-Agency (covered on next slide).



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

**Look Up Sub Agency**

Sub-Agency: begins with

[Basic Lookup](#)

**Search Results**

View All First  1-40 of 40  Last

Sub-Agency	Description
<a href="#">AW</a>	<a href="#">ALTERNATE AGRICULTURE RESEARCH AND COMMERCIALIZATION</a>
<a href="#">02</a>	<a href="#">Agricultural Marketing Service</a>
<a href="#">03</a>	<a href="#">Agricultural Research Service</a>
<a href="#">34</a>	<a href="#">Animal and Plant Health Inspection Service</a>
<a href="#">22</a>	<a href="#">Cooperative State Research, Education, and Extension Service</a>
<a href="#">90</a>	<a href="#">DM, Office of the Chief Financial Officer</a>
<a href="#">DA</a>	<a href="#">Departmental Administration</a>
<a href="#">18</a>	<a href="#">Economic Research Service</a>
<a href="#">FA</a>	<a href="#">Farm Service Agency</a>
<a href="#">37</a>	<a href="#">Food Safety and Inspection Service</a>
<a href="#">30</a>	<a href="#">Food and Nutrition Service</a>
<a href="#">10</a>	<a href="#">Foreign Agricultural Service</a>
<a href="#">11</a>	<a href="#">Forest Service</a>
<a href="#">39</a>	<a href="#">Grain Inspection, Packers and Stockyards Administration</a>

C-12

**Note:** Sub-Agencies will be listed in numerical order by Sub-Agency code. Select the **Description** column heading to sort Sub-Agencies by alphabetical order.

**Step C-12. Sub Agency:** (Required) Select the link for the Sub-Agency. Once selected, you will see the full name of the Sub-Agency populated on the Contract/Grant Agreement screen.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-13

C-14

Contract Description: Headquarters Help Desk

\*Sub Agency: 11 Forest Service

\*Period of Performance Start Date: 10/20/2011

\*Period of Performance End Date: 10/19/2012

\*USDA POC:

Security Office Identifier:

Submitting Office Number:

OPAC/ALC Number:

Notes:

Company/Organization Information

October 2012

S	M	T	W	T	F	S
		1	2	3	4	5
	7	8	9	10	11	12
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Current Date


**Step C-13. Period of Performance Start Date:** (Required) Enter the **Period of Performance Start Date**, or click on the calendar icon to look up the date.


**Step C-14. Period of Performance End Date:** (Required) Enter or select the **Period of Performance End Date**.


**Note:** Period of Performance Dates determine if a Non-Employee is active on a contract, grant or agreement. When the Period of Performance date is reached, all non-employees associated with the contract, grant or agreement will be set to "TERMINATED" by the system automatically.

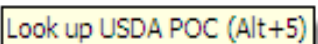


## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

\*Period of Performance Start Date:  

\*Period of Performance End Date:  

\*USDA POC:   **C-15**

Security Office Identifier:  

Submitting Office Number:

OPAC/ALC Number:

Notes:

**Step C-15. USDA POC:** (Required) Use the lookup function (magnifying glass) to select the **USDA POC** for the Contract, Grant or Agreement and proceed to the next slide.

**Note:** Due to the large amount of records in the system, users may experience extended processing time when selecting the USDA POC.





## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-16

**Look Up USDA POC**

EmplID:

Name:

[Basic Lookup](#)

**Search Results**

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) [First](#)  [Last](#)

EmplID	Name
<a href="#">12345</a>	<a href="#">Mouse,Minnie</a>

DPR: USDA POC Name to be populated on the detailed Contract/Grant/Agreement record once an EmplID is selected.

C-17

**Note:** Please note that if you do not enter any search terms under the **USDA POC** field, this will result in extended system processing time.

**Step C-16. USDA POC:** (Required) You will be directed to the Look Up USDA POC screen where you can search records by **EmplID** or **Name**. To search by Name, enter search terms in the following format: **Last Name, First Name**.

**Step C-17. Search Results:** (Required) Select the applicable hyperlink from the list of search results and proceed to the next slide.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-18	Security Office Identifier:	1234
C-19	Submitting Office Number:	4689
C-20	OPAC/ALC Number:	9876541
C-21	Notes:	TEST NOTES

**Step C-18. Security Office Identifier:** (Optional) Enter the Security Officer Identifier (SOI).

**Step C-19. Submitting Office Number:** (Optional) Enter the Submitting Office Number (SON).

**Step C-20. OPAC/ALC Number:** (Optional) Enter the OPAC/ALC Number.


**Step C-21. Notes:** (Optional) Enter any notes about the Contract, Grant or Agreement.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-22

Company/Organization Information

DUNS:  

Company:

POC Address Line 1:

POC Address Line 2:

POC City:

POC State:

POC Postal Code: Country:

POC Phone Number:

**Step C-22. DUNS:** (Optional) Use the lookup function (magnifying glass) to select a **DUNS** number for a Company/Organization that exists in the system (covered on the next slide). If a record does not already exist for the appropriate Company/Organization, you can save the Contract, Grant or Agreement without Company/Organization Information and enter it later.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

C-23

### Look Up DUNS

DUNS:

Description:  TEST

Look Up

Clear

Cancel

[Basic Lookup](#)

### Search Results

View All  1-7 of 7


DUNS	Description
<a href="#">1234567890123</a>	<a href="#">TESTING123</a>
<a href="#">897465123</a>	<a href="#">Test Company</a>
<a href="#">000000009</a>	<a href="#">Test For You</a>
<a href="#">321654987</a>	<a href="#">Testing2</a>
<a href="#">000000002</a>	<a href="#">test</a>
<a href="#">334634663</a>	<a href="#">test</a>
<a href="#">987654321</a>	<a href="#">testtesttest</a>







**Step C-23. DUNS:** (Optional) Enter the search terms and select Look Up to search the system for a Company/Organization, then click on the hyperlink for the appropriate Company/Organization.



## Module C: Finding or Creating a Contract, Grant or Agreement Record (Required)

**Company/Organization Information**

DUNS:	<input type="text" value="123456789"/>	
Company/Organization Name:	Test Company	
POC Address Line 1:	123 MAIN ST.	
POC Address Line 2:	SUITE 1200	
POC City:	ORLANDO	
POC State:	FL	Florida
POC Postal Code:	32825	Country: USA
POC Phone Number:	891/548-9642	

**C-24**  Save  Notify  Add  Update/Display  Include History  Correct History

**Note:** The Contract/Grant/Agreement record will be populated with the details of the Company/Organization you selected.

**Step C-24.** Click **Save**.





## Module D: Finding or Creating a Person Information Record (Required)

Congratulations! You have just learned how to find, enter, and save a Contract, Grant or Agreement record in Person Model.

The next few screens show you how to create a Person Information record in Person Model (or verify that it is already in the system). Only a Federal employee may create or edit Person Information records in Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module D: Finding or Creating a Person Information Record (Required)

DPR: Menu items and Page headings to be made consistent.

D-1

The screenshot shows the EmpowHR system interface. On the left is a navigation menu with the following items: My Favorites, Employee Self Service, Workforce Administration, Non-Employee Processing, NEIS Reports, **Person Information** (highlighted), Add a New Relationship, Maintain a Persons Assignment, Person Organizational Summary, Company/Organization, Contract Information, EmpowHR Setup Tables (HD), Set Up HRMS, Worklist, Reporting Tools, Change My Password, My Personalizations, My System Profile, My Dictionary, and EmpowHR Documentation. A red arrow points from the 'DPR: Menu items and Page headings to be made consistent.' text to the 'Person Information' menu item. Another red arrow points from the 'DPR: Menu items and Page headings to be made consistent.' text to the 'Personal Information' heading in the main content area. The main content area is titled 'Personal Information' and contains the text 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this text are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search form includes fields for: EmplID: (dropdown: begins with, text input), First Name: (dropdown: begins with, text input), Last Name: (dropdown: begins with, text input: test), Social Security Number: (= dropdown, text input), and Date of Birth: (= dropdown, text input, calendar icon). Below the form are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom are buttons for 'Search' (highlighted with a red box), 'Clear', and links for 'Basic Search' and 'Save Search Criteria'. A red box labeled 'D-2' encloses the search form fields. A red box labeled 'D-1' encloses the 'Person Information' menu item in the left navigation pane.

D-2

**Step D-1.** From the left navigation menu select **Person Information**. This will direct you to the Person Information main menu. From here you can search for existing records or enter a new one.

**Step D-2.** To find an existing value in the system, enter the search terms, then Click **Search**.



## Module D: Finding or Creating a Person Information Record (Required)

**Personal Information**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

EmplID:    
 First Name:    
 Last Name:    
 Social Security Number:    
 Date of Birth:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

**Search Results**  
View All First 1-3 of 3 Last

EmplID	First Name	Last Name	National ID Format	Date of Birth
261005	SHOLA	TEST	XXX-XX-7484	09/07/1977
261997	JOHN	TESTER	XXX-XX-9678	07/22/1945
262021	GIRL	TESTER	XXX-XX-2003	02/02/1962

D-3

**Note:** If the search yields multiple records that match the search criteria, only the first 300 records will display. If you do not see the Person Information hyperlink in the list of search results, you may enter a new record.

**Step D-3:** Select the applicable hyperlink from the list of search results.



## Module D: Finding or Creating a Person Information Record (Required)

D-4

**Step D-4.** Make any changes to the record as needed.

**Note:** Make sure the yellow Correct History button is selected on the bottom right to make any changes to a saved record.

For any SSN or DOB changes or updates, you must contact the USDA HSPD-12 Help Desk.

**Step D-5.** Click the **Save** button to save information entered.

Biographical Details

Contact Details

JOHN TESTER

Person ID: 261997

Name

Find | View All

First 1 of 1

Last

\*Effective Date:

09/08/2011

+

-

\*Display Name:

JOHN TESTER

Edit Name

Biographic Information

\*Date of Birth:

07/24/1945

66

Years

2

Months

Date of Death:

Date of Birth Re-enter

07/24/1945

Birth Country:

USA

Birth State:

CO

Colorado

Birth Location:

County

Biographical History

Find | View All

First 1 of 1

Last

\*Effective Date:

09/08/2011

+

-

\*Gender:

Unknown

National ID

Customize | Find | View All

First 1 of 1

Last

Country	*National ID Type	*National ID	National ID Re-enter	Primary ID
USA	Social Security Number	523-17-9679	523-17-9679	<input checked="" type="checkbox"/>

\*Country of Citizenship

USA

☐ Emergency Response Official

Notes:

Save

Return to Search

Previous in List

Next in List

Notify

Previous tab

Next tab

D-5



## Module D: Finding or Creating a Person Information Record (Required)

**Personal Information** **D-6**

[Find an Existing Value](#) **Add a New Value**

EmplID:

**D-7** **Add**

[Find an Existing Value](#) | [Add a New Value](#)

**Step D-6.** To add a new **Person Information** record to the system, click the **Add a New Value** tab.

**Note:** **EmplID** will default to NEW and **Empl Rcd Nbr** will default to 0. Do not edit these fields.

**Step D-7.** Click the **Add** button. You will be directed to a new **Person Information** record.





## Module D: Finding or Creating a Person Information Record (Required)

You will now learn how to enter data for a new Person Information record.

The screenshot to the right shows a blank Person Information record. Note the three tabs at the top of the record. You will enter information on each of these tabs.

The slides that follow will show small subsets of this record.

The minimum required fields to save a Person Information record are:

- Effective Date (pre-populated)
- First and Last Name
- DOB (enter twice)
- Effective Date and Gender (pre-populated)
- SSN (enter twice)
- Country of Citizenship
- Home Address 1, City, State, Country
- Business Email
- Organizational Relationship/Type and Assignment

Biographical Details
Contact Details
Organizational Relationships

Person ID: NEW

Name
Find | View All
First 1 of 1 Last

\*Effective Date: 09/28/2011
\*Display Name: Add Name

Biographic Information

\*Date of Birth:
Date of Birth Re-enter
Birth Country: USA
Birth State:
Birth Location:

Biographical History
Find | View All
First 1 of 1 Last

\*Effective Date: 09/28/2011
\*Gender: Unknown

National ID
Customize | Find | View All
First 1 of 1 Last

Country	*National ID Type	*National ID	National ID Re-enter	Primary ID
USA	Social Security Number			<input checked="" type="checkbox"/>

\*Country of Citizenship
Emergency Response Official

Notes:



## Module D: Finding or Creating a Person Information Record (Required)

D-8

Biographical Details | Contact Details | Organizational Relationships

Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011

\*Display Name: Add Name

Biographic Information

\*Date of Birth: 0 Years 0 Months

Date of Birth Re-enter

Birth Country: USA

Birth State:

Birth Location:

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011

\*Gender: Unknown

**Note:** The system will direct you to the **Biographical Details** tab.

**Step D-8. Effective Date:** (Required) The **Effective Date** will be populated with the current date.



## Module D: Finding or Creating a Person Information Record (Required)

Biographical Details Contact Details Organizational Relationships

Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011

\*Display Name: **D-9** [Add Name](#)

Biographic Information

\*Date of Birth: 0 Years 0 Months

Date of Birth Re-enter

Birth Country: USA

Birth State:

Birth Location:

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011

\*Gender: Unknown

**Step D-9.** Click the **Add Name** hyperlink. You will be directed to a new screen where you will enter the full name of the non-employee.

**Note:** You must enter the person's name as shown on their government-issued ID, such as a driver's license or passport. If the information does not match, the applicant will not be eligible for enrollment.



## Module D: Finding or Creating a Person Information Record (Required)

**Edit Name**

English Name Format

D-10 Prefix: Mr

D-11 First: MICKEY

D-12 Middle Name: M.

D-13 Last Name: MOUSE

D-14 Suffix: SENIOR

**Step D-10. Prefix:** (Optional) Select the Person's prefix from the drop-down list.

**Step D-11. First:** (Required) Enter the Person's first name.

**Step D-12. Middle Name:** (Optional) Enter the Person's middle name.

**Step D-13. Last Name** (Required) Enter the Person's last name.

**Step D-14. Suffix:** (Optional) Select the Person's suffix from the drop-down list.



## Module D: Finding or Creating a Person Information Record (Required)

**Edit Name**

English Name Format

Prefix:

First:  Middle Name:

Last Name:

Suffix:

**Refresh Name** Display Name: MICKEY MOUSE  
Formal Name: Mr MICKEY MOUSE  
Name: MOUSE,MICKEY M.

**D-15**

**Note:** If you select the yellow **Refresh Name** button, the system will populate the Display Name, Formal Name, and Name on this screen. Display Name will be populated on the Biographical Details page.

**Step D-15.** Click the **OK** button. You will be directed back to the Biographical Details screen.





## Module D: Finding or Creating a Person Information Record (Required)

D-16

D-17

**Biographic Information**

\*Date of Birth: 05/15/1928 83 Years 4 Months

Date of Birth Re- 05/15/1928

Birth Country: USA

Birth State:

Birth Location:

**Biographical History**

\*Effective Date:

\*Gender:

**National ID**

Country	*National ID Type	*National ID	National ID Re-enter	Primary ID
USA	Social Security Number			<input checked="" type="checkbox"/>

**Step D-16. Date of Birth: (Required)** Enter the Person's **date of birth** (mm/dd/yyyy), or use the **lookup function** to select it from the calendar.

**Step D-17. Date of Birth Re-enter: (Required)** Re-enter the **Date of Birth** information you previously entered in Step D-9, or use the **lookup function** to select it from the calendar. You will see the person's current age populated on screen when completed.



## Module D: Finding or Creating a Person Information Record (Required)

D-18

Biographical Details   Contact Details   Organizational Relationships

Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 31 + -

\*Display Name: Add Name

Biographic Information

\*Date of Birth: 0 Years 0 Months

Date of Birth Re-enter 31

Birth Country: USA 🔍

Birth State: 🔍

Birth Location:

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 31 + -

\*Gender: Unknown ▼

**Step D-18. Birth Country:** Enter in the 3-letter country code or use the **lookup feature** to select the 3-letter code for the Person's **Birth Country**. The country field defaults to USA but can be changed. If you select the magnifying glass, you will be directed to another screen.



## Module D: Finding or Creating a Person Information Record (Required)

### Look Up Birth Country

Country:

Description:

Look Up

Clear

Cancel

[Basic Lookup](#)

#### Search Results

[View All](#) [First](#) 1-100 of 241 [Last](#)

Country	Description
<a href="#">ABW</a>	<a href="#">Aruba</a>
<a href="#">AFG</a>	<a href="#">Afghanistan</a>
<a href="#">AGO</a>	<a href="#">Angola</a>
<a href="#">AIA</a>	<a href="#">Anquilla</a>
<a href="#">ALB</a>	<a href="#">Albania</a>
<a href="#">AND</a>	<a href="#">Andorra</a>
<a href="#">ANT</a>	<a href="#">Netherlands Antilles</a>
<a href="#">ARE</a>	<a href="#">United Arab Emirates</a>
<a href="#">ARG</a>	<a href="#">Argentina</a>

**Note:** Enter the search terms to find the **Birth Country**. **Country** is a three-character country code, and **Description** is the country name. The list is sorted by country code. Click on the Description column heading to sort alphabetically by country name. When you are done, click on the appropriate hyperlink from the list of search results.



## Module D: Finding or Creating a Person Information Record (Required)

Biographical Details Contact Details Organizational Relationships

Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 31 + -

\*Display Name: Add Name

Biographic Information

\*Date of Birth: 0 Years 0 Months

Date of Birth Re-enter 31

Birth Country: USA Q

**Birth State: Q**

Birth Location:

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 31 + -

\*Gender: Unknown v

D-19

**Step D-19. Birth State:** If the Birth Country is USA, enter the two-letter **Birth State** or use the lookup function (magnifying glass) to select the State. If you selected a non-U.S. location for Birth Country, this field will not be available.



## Module D: Finding or Creating a Person Information Record (Required)

### Look Up Birth State

Birth Country:

USA

State:

begins with ▼

Description:

begins with ▼

Look Up

Clear

Cancel

[Basic Lookup](#)

### Search Results

View All

First

1 of 59

Last

State	Description
<a href="#">AK</a>	<a href="#">Alaska</a>
<a href="#">AL</a>	<a href="#">Alabama</a>
<a href="#">AR</a>	<a href="#">Arkansas</a>
<a href="#">AS</a>	<a href="#">American Samoa</a>
<a href="#">AZ</a>	<a href="#">Arizona</a>
<a href="#">CA</a>	<a href="#">California</a>
<a href="#">CO</a>	<a href="#">Colorado</a>
<a href="#">CT</a>	<a href="#">Connecticut</a>
<a href="#">DC</a>	<a href="#">District of Columbia</a>
<a href="#">DE</a>	<a href="#">Delaware</a>

**Note:** Enter the search terms to find the **Birth State**. The list is sorted by state code. Click on the Description column heading to sort alphabetically by state name. When you are done, click on the appropriate hyperlink from the list of search results. The state name will be populated on the Biographical Details screen.





## Module D: Finding or Creating a Person Information Record (Required)

Biographical Details Contact Details Organizational Relationships

MICKEY MOUSE Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 09/28/2011 + -

\*Display Name: MICKEY MOUSE [Edit Name](#)

Biographic Information

\*Date of Birth: 05/15/1928 83 Years 4 Months

Date of Birth Re-enter: 05/15/1928

Birth Country: USA

Birth State: VA Virginia

**D-20** Birth Location: Colinsville

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 09/28/2011 + -

\*Gender: Unknown

**Step D-20. Birth Location:** Enter the birth city.



## Module D: Finding or Creating a Person Information Record (Required)

Biographical Details | Contact Details | Organizational Relationships

Person ID: NEW

Name Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 [31] + -

\*Display Name: [Add Name](#)

Biographic Information

\*Date of Birth: [ ] [31] 0 Years 0 Months

Date of Birth Re-enter [ ] [31]

Birth Country: USA [ ]

Birth State: [ ] [ ]

Birth Location: [ ]

Biographical History Find | View All First 1 of 1 Last

\*Effective Date: 06/22/2011 [31] + -

\*Gender: Unknown [ ]

D-21

D-22

**Step D-21. Effective Date:** (Required) The **Effective Date** of the Biographical History is required, but has been pre-populated with the current date. To change the date, enter a new date or use the calendar icon to look up a date.

**Step D-22. Gender:** (Required) This field is required, but has been pre-populated with Unknown. To change the value, select Female, Male, or Unknown from the drop-down list.



## Module D: Finding or Creating a Person Information Record (Required)

**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date: 09/28/2011

\*Gender: Unknown

**National ID** Customize | Find | View All First 1 of 1 Last

Country	*National ID Type D-23	*National ID D-24	National ID Re-enter D-25	Primary ID
USA	Social Security Number	123456789	123456789	<input checked="" type="checkbox"/>

**Step D-23. National ID Type:** (Required) **Social Security Number** will be pre-populated in this field.


**Step D-24. National ID:** (Required) Enter the person's 9-digit Social Security Number (SSN).

**Step D-25. National ID Re-enter:** (Required) Re-enter the person's 9-digit Social Security Number (SSN).

**Note:** The **Primary Email** box will be checked by default, indicating this is the non-employee's primary form of ID.



## Module D: Finding or Creating a Person Information Record (Required)

**D-26** \*Country of Citizenship   ☒ Emergency Response Official **D-27**

**D-28** Notes:

**Step D-26. Country of Citizenship:** Enter the 3-letter country code or click on the magnifying glass icon to select the 3-letter code for the Person's **Country of Citizenship**.

**Step D-27. Emergency Response Official (ERO):** (Optional) If the Person has emergency response duties in the event of a disaster, check this option. This designation will be printed on the Person's USDA LincPass.

**Step D-28. Notes:** (Optional) Enter the Person's ERO title or duties in this field.

**Note:** The **Emergency Response Official (ERO)** field only applies to an Agency-identified Person serving in an Emergency Response Official capacity. Contact your Security Officer for more information.



## Module D: Finding or Creating a Person Information Record (Required)

[Biographical Details](#) **Contact Details** [Organizational Relationships](#)

**D-29** Person ID: NEW

**Current Addresses** [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

<u>Address Type</u>	<u>As Of Date</u>	<u>Status</u>	<u>Address</u>
Home			

**D-30** [Add Address Detail](#) + -

**Phone Information** [Customize](#) | [Find](#) | First 1 of 1 Last

<u>*Phone Type</u>	<u>Telephone</u>	<u>Extension</u>	<u>Preferred</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

**Step D-29:** Click on the **Contact Details** tab.

**Step D-30.** Click the **Add Address Details** hyperlink.

**Note:** The home address entered here must match the US-issued address on I-9 documentation. The address cannot be a foreign address. If the information does not match, the non-employee will have problems during the enrollment process.





## Module D: Finding or Creating a Person Information Record (Required)

**Address History**

Address Type: Home

Address History			Find	First	1 of 1	Last
*Effective Date	Country	Status	Address:			
6/22/2011	USA	A				
				Add Address		

OK Cancel

**D-31**      **D-32**      **D-33**

**Step D-31. Effective Date:** (Required) The **Effective Date** of the Address History is required, but has been pre-populated with the current date. To change the date, enter a new date or use the calendar icon to look up a date.

**Step D-32. Country:** (Required) The **Country** is required, but has been pre-populated with USA. To change the Country, use the lookup (magnifying glass) to select the country.

**Step D-33. Status:** (Required) The **Status** is required, but has been pre-populated with **A** for Active.



## Module D: Finding or Creating a Person Information Record (Required)

**Address History**

Address Type: Home

Address History				Find	First	1 of 1	Last
*Effective Date	Country	*Status	Address:				
06/22/2011	USA	A					

[Add Address](#)

**D-34**

OK Cancel

**Step D-34.** Click the **Add Address** hyperlink. You will be directed to the Edit Address screen where you will enter Address details.



## Module D: Finding or Creating a Person Information Record (Required)

**Edit Address**

Country: United States

D-35 Address 1: 6830 WEST 25TH ST.

Address 2: APARTMENT 15-B

Address 3:

D-36 City: KISSIMMEE State: FL Florida D-37 Postal: 24747

County: OSCEOLA

OK Cancel

**Note:** The Country selected in the previous step will be populated on this screen.

**Step D-35. Address Line 1** (Required), **Address Line 2** (Optional), and **Address Line 3** (Optional): Enter the street address into these lines.

**Step D-36. City:** (Required) Enter the City. If a unique City is entered, the system will populate the State and County for you.

**Step D-37. State:** (Required) Enter the State Code or use the lookup feature (magnifying glass) to select the State.



## Module D: Finding or Creating a Person Information Record (Required)


**Edit Address**

Country: United States

Address 1: 6830 WEST 25TH ST.

Address 2: APARTMENT 15-B

Address 3:

City: KISSIMMEE State: FL  Florida

County: OSCEOLA

Postal: 24747

D-39

D-40

D-38

**Step D-38. Postal:** (Required) Enter the Postal code into this field.

**Step D-39. County:** (Optional) The Country will be populated based on the address information entered.

**Step D-40.** When you are done, click the **OK** button to return to the Address History screen.



## Module D: Finding or Creating a Person Information Record (Required)

**Address History**

Address Type: Home

Address History				Find	First	1 of 1	Last
*Effective Date	Country	*Status	Address:				
09/28/2011	USA	A	6830 WEST 25TH ST. APARTMENT 15-B KISSIMMEE, FL 24747 OSCEOLA	<a href="#">Add Address</a>			

**D-41**

**Note:** The information you entered will be populated on the Address History Screen.

**Step D-41.** When you are done, click the **OK** button to return to the Contact Details screen.





## Module D: Finding or Creating a Person Information Record (Required)

D-42

Phone Information

Customize | Find | First 1 of 1 Last

Phone Type Telephone Extension Preferred

Business  
Campus  
Dormitory  
FAX  
Flexiplace Phone  
Home  
Main  
Mobile  
Other  
Pager 1  
Pager 2  
Telex

Email Address Preferred

previous tab Next tab Add Update/Display

Details | Organizational Relationships

**Note:** Phone Information is not required unless you select Phone Type.

**Step D-42. Phone Type:** (Optional) If you select an option from the Phone Type drop-down menu, you must enter a telephone number in the next field. To enter a telephone number, select the **Phone Type** from the drop-down menu.



## Module D: Finding or Creating a Person Information Record (Required)

D-43

D-44

D-45

**Phone Information** Customize | Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred
Business	876/456-8364	12	<input checked="" type="checkbox"/>

**Email Addresses** Customize | Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred
Business		<input type="checkbox"/>

Save Notify Previous tab Next tab Add Update/Display

[Biographical Details](#) | [Contact Details](#) | [Organizational Relationships](#)

**Step D-43. Telephone:** (Required if Phone Type selected) Enter the telephone number in this field.

**Step D-44. Extension:** (Optional) If the telephone has an extension number, enter the Extension.

**Step D-45. Preferred:** (Optional) Check this box if this is the non-employee's preferred telephone number.



## Module D: Finding or Creating a Person Information Record (Required)

D-46

**Email Addresses** Customize | Find | First 1 of 1 Last

\*Email Type \*Email Address Preferred

Business Blackberry Business Campus Dorm Home Other

previous tab Next tab Add Update/Display

[Details](#) | [Organizational Relationships](#)

**Step D-46. Email Type:** (Required) Select the **email type** from the drop-down menu. Business email is preferred. When Business is selected as the type, the Preferred Checkbox will be checked and masked to prevent user data entry.



## Module D: Finding or Creating a Person Information Record (Required)

**D-47** **D-48**

**D-49**

**Email Addresses** Customize | Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred
Business	mmouse1@usda.gov	<input checked="" type="checkbox"/>

**Save** **Notify** **Previous tab** **Next tab** **+ Add** **Update/Display**

[Biographical Details](#) | [Contact Details](#) | [Organizational Relationships](#)

**Step D-47. Email Address:** (Required) Enter the **email address** in this field.

**Step D-48.** To include additional email addresses, click on the **+** box..

**Step D-49.** Click the **Save** button to save information entered.

**Note:** After you click **Save**, you will return to the main Contact Details tab.



## Module D: Finding or Creating a Person Information Record (Required)

[Biographical Details](#) [Contact Details](#) **Organizational Relationships** **D-50**

MICKEY MOUSE Person ID: NEW

Choose Org Relationship to Add

☐ Employee

☐ Contingent Worker

☒ **D-51** Person of Interest

**D-52**

Affiliate

**Contractor**

Fellow

Intern

Volunteer

[Save](#) [Notify](#) [Previous](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Biographical Details](#) | [Contact Details](#) | [Organizational Relationships](#)

**Step D-50:** Click on the **Organizational Relationships** tab.

**Step D-51: Choose Org Relationship to Add:** Check the **Person of Interest** box (all other boxes are masked).

**Step D-52:** Select the **Person of Interest** type.





## Module D: Finding or Creating a Person Information Record (Required)

Biographical Details | Contact Details | Organizational Relationships

MICKEY MOUSE Person ID: NEW

Choose Org Relationship to Add

☐ Employee

☐ Contingent Worker

☒ Person of Interest Contractor

**D-53** Add the Relationship

Save Notify Previous tab Next tab Add Update/Display Include History Correct History

[Biographical Details](#) | [Contact Details](#) | [Organizational Relationships](#)

**Step D-53:** Click **Add the Relationship**. You will be re-directed to the **Add Person of Interest** tab.

**Note:** You must follow the steps covered on the next few slides to save the Person Information record. If you do not complete these steps, the system will not save the information you have entered.



## Module D: Finding or Creating a Person Information Record (Required)

You will now learn how to complete the Organizational Relationship and Assignment.

The screenshot to the right shows a blank Organizational Relationship. Note the two tabs at the top of the record. You will enter information on both of these tabs.

The slides that follow will show small subsets of this record.

The minimum required fields to complete the Organizational Relationship are:

- Effective Date (pre-populated)
- Security Access Type
- Value 1
- Value 2
- Effective Date (pre-populated)
- Organizational Relationship Status (pre-populated)
- Contract/Grant/Agreement Number
- Status
- Effective Date (pre-populated)

**Add Person of Interest** **Assignment**

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: 09/29/2011 Get Enabled Security Types

**\*Security Access** Enabled Value 1 Value 2

Type  ☐

**Person of Interest History** Customize | Find First 1 of 1 Last

	*Effective Date	*Organizational Relationship Status	Planned Exit	More Information
1	09/29/2011	A		



## Module D: Finding or Creating a Person Information Record (Required)

**Add Person of Interest** Assignment

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: **D-54** 09/28/2011

Get Enabled Security Types

Customize | Find | First 1 of 1 Last

*Security Access Type	Enabled	Value 1	Value 2
	<input type="checkbox"/>		

On the Add a Person of Interest tab you will see the following fields already populated: **Name**, **Person ID**, and **Person of Interest Type**.

Completion of the following required Security Data fields assign the non-employee as a Person of Interest who supports USDA. There is only one value for each field. Several of the required fields are pre-populated.

**Step D-54: Effective Date:** (Required) This field defaults to the current date. Edit the **Effective Date** as needed in by typing the date in the box or using the calendar lookup function.



## Module D: Finding or Creating a Person Information Record (Required)

My Favorites
Employee Self Service
Workforce Administration
Non-Employee Processing
NEIS Reports
Person Information
Add a New Relationship
Maintain a Persons
Assignment
Person Organizational Summary
Company/Organization
Contract Information
EmpowHR Setup Tables (HD)
Set Up HRMS
Worklist

Add Person of Interest
Assignment

MICKEY MOUSE
Person ID: 262105

Person of Interest Type: Contractor

Security Data
Find | View All
First 1 of 1 Last


\*Effective Date: 09/28/2011

Get Enabled Security Types

Customize | Find
First 1 of 1 Last

*Security Access Type	Enabled	Value 1	Value 2
<div> <div></div> </div>	<input type="checkbox"/>	<div> <div></div> </div>	

**Note:** Non-Employee role holders should NOT click the yellow **Get Enabled Security Types** button. This only applies to HR Person Model users who maintain information for both federal employees and non-employees. If a user who only has access to the Non-Employee screens selects this, it will remove data entered on this screen and you will have to re-enter it.


United States Department of Agriculture

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## Module D: Finding or Creating a Person Information Record (Required)

Add Person of Interest **Assignment**

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: 09/28/2011 Get Enabled Security Types

*Security Access Type	Enabled	Value 1	Value 2
POI DEPT	<input checked="" type="checkbox"/> SetID	NOEMP	AGNEIS

**Step D-55:** (Required) Select **POI Dept** from the **Security Access Type** drop-down list.

**Note:** The **Enabled** box will be checked when you select **POI DEPT** and **SetID** will be populated on the screen.

**Step D-56:** (Required) Use the lookup function to select **NOEMP** for **Value 1**.

**Step D-57:** (Required) Use the lookup function to select **AGNEIS** for **Value 2**.





## Module D: Finding or Creating a Person Information Record (Required)

**Step D-58:** (Optional) **Effective Date:** This field defaults to the current date. You may edit this field by typing in the date or using the lookup function.

**Step D-59:** (Optional) **Organizational Relationship Status:** This field defaults to **A** for Active. Once a Person's Organizational Relationship has ended, Organizational Relationship Status will be set to **I** for Inactive. Changes to this field will not impact individual assignments.

**Step D-61:** (Optional) **Planned Exit:** Use the lookup function to select a **Planned Exit** date.

**Step D-61:** (Optional) **More Information:** Enter any notes about the Person of Interest History in this field.

**Step D-62:** Click **OK** to save the Person Information record and the data entered on this tab.



## Module D: Finding or Creating a Person Information Record (Required)

[Edit POI Relationship](#) **Assignment**

**Contract** **D-63**

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LincPass Required
1						09/28/2011		<input type="checkbox"/>

**D-64**

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Edit POI Relationship](#) | [Assignment](#)

**Step D-63:** Click on the **Assignment** tab. You will see the following fields already populated: **Name**; **Person ID**; and **Person of Interest Type**.

**Step D-64:** (Required) Use the lookup function to find the **Contract, Grant or Agreement Number**. You will be directed to another screen where you can search for the Contract/Grant/Agreement.



## Module D: Finding or Creating a Person Information Record (Required)

**Look Up Contract/Agreement**

Account #: begins with

Agency: begins with

Sub-Agency: begins with

Expiration Date: =

[Basic Lookup](#)

**Search Results**

View All First  Last

Account #	Agency	Sub-Agency	Expiration Date
ABC123	AG	03	09/16/2011
<a href="#">ABC12345</a>	<a href="#">AG</a>	<a href="#">11</a>	<a href="#">10/19/2012</a>

D-65

**Step D-65:** Use the lookup function to find the **Contract, Grant or Agreement Number**. then select the hyperlink for the appropriate record from the list of search results.

## Module D: Finding or Creating a Person Information Record (Required)

[Edit POI Relationship](#) [Assignment](#)

### Contract

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LinkPass Required
1 ABC12345	11	FS	10/20/2011	10/19/2012	<div><div>▼</div><div>Active Suspended Terminated</div></div>	09/28/2011		<input type="checkbox"/>

[Customize](#) | [Find](#) First 1 of 1 Last

[Save](#) [Return to Search](#) [Notify](#)

[Edit POI Relationship](#) | [Assignment](#)

[Update/Display](#) [Include History](#) [Correct History](#)

**D-66**

**Note:** The **Sub-Agency Code**, **Sub-Agency Description**, and **Period of Performance Start and End Dates** fields will be automatically populated based on the Contract, Grant, or Agreement selected.

**Step D-66:** (Required) Use the drop-down menu to select the **Status**. You can choose from Active, Suspended, or Terminated.



## Module D: Finding or Creating a Person Information Record (Required)

[Edit POI Relationship](#)
[Assignment](#)

### Contract

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LinkPass Required
1 ABC12345	11	FS	10/20/2011	10/19/2012	<div> Active  Suspended  Terminated </div>	09/28/2011		<input type="checkbox"/> <a href="#">Work Address Info</a>

[Save](#)
[Return to Search](#)
[Notify](#)

[Update/Display](#)
[Include History](#)
[Correct History](#)

[Edit POI Relationship](#) | [Assignment](#)

**NOTE:** If a Non-Employee is assigned to multiple contracts, grants or agreements, changing status on one assignment will not affect status on other assignments. Non-Employee status will be derived using the following rules:

Active on at least one assignments = Active Non-Employee Status  
 Suspended on ALL assignments = Suspended Non-Employee Status  
 Terminated on ALL assignments = Terminated Non-Employee Status

**Selecting "Terminated" has serious repercussions in the HSPD-12 system and will result in card revocation and the Non-Employee will be immediately escorted from the facility.**





## Module D: Finding or Creating a Person Information Record (Required)

[Edit POI Relationship](#)
[Assignment](#)

### Contract

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LincPass Required	Work Address Info
1 ABC12345	11	FS	10/20/2011	10/19/2012	Active	09/28/2011		<input type="checkbox"/>	<a href="#">+</a>

[Save](#)
[Return to Search](#)
[Notify](#)

[Update/Display](#)
[Include History](#)
[Correct History](#)

[Edit POI Relationship](#) | 
 [Assignment](#)

**Step D-67:** (Required) **Effective Date:** This field defaults to the current date. Edit the **Effective Date** as needed in by typing the date in the box or using the calendar lookup function.

**Step D-68:** (Optional) Select **Detail** to view the detailed record of the Contract/Grant/Agreement.



## Module D: Finding or Creating a Person Information Record (Required)

**Contract/Grant/Agreement Information**

Type:	Contract		
Number:	ABC12345		
Contract Description:	Headquarters Help Desk		
Sub Agency:	11	Forest Service	
Period of Performance Start Date:	10/20/2011		
Period of Performance End Date:	10/19/2012		
CO/COR/COTR:	Zachary Wassel		
USDA POC:	001000		
Security Office Identifier:	1234		
Submitting Office Number:	4689		
OPAC/ALC Number:	9876541		
Notes:	<div>TEST NOTES</div>		

**Company/Organization Information**

DUNS:	897465123		
Company:	Test Company		
POC Address Line 1:	123 MAIN ST.		
POC Address Line 2:	SUITE 1200		
POC City:	ORLANDO		
POC State:	FL	Florida	Country USA
POC Postal Code:	32825		
POC Phone Number:	891/548-9642		

OK

**Note:** (Optional) When the **Detail** button is selected, you can view the detailed record of the Contract/Grant/Agreement. Click **OK** to return to the Assignment tab.



# Module D: Finding or Creating a Person Information Record (Required)

Edit POI Relationship

Assignment

Contract

MICKEY MOUSE

Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LincPass Required	Work Address Info
1 ABC12345	11	FS	10/20/2011	10/19/2012	Active	09/28/2011		<input type="checkbox"/>	

Save

Return to Search

Notify

Update/Display

Include History

Correct History

[Edit POI Relationship](#) | [Assignment](#)

D-69

**Note:** **Sponsor ID** will be blank, and **LincPass Required** will be masked for Data Entry Personnel who do not hold the Sponsor role as well.

If you are a Sponsor, you can complete Sponsorship now. Detailed procedures are covered in Module F: Sponsorship.

**Step D-69: Work Address Info** (Optional): Click the hyperlink for **Work Address Info** to enter details of the non-employee's Work Address.




## Module D: Finding or Creating a Person Information Record (Required)

**Work Address**

**D-70**

**Work Address**

Country: USA  United States

Address: [Edit Address](#)

**D-71**

Geographical Location Code:

Building #:

Room Number:

**Step D-70: Country** (Required): The **Country** defaults to USA. Use the lookup function (magnifying glass) to change the country.

**Step D-71:** Click **Edit Address** to add the Work Address details.



## Module D: Finding or Creating a Person Information Record (Required)

D-72

### Edit Address

Country:	United States		<a href="#">Change Country</a>
Address 1:	<input type="text" value="85 WEST 85TH ST. NW"/>		
Address 2:	<input type="text" value="SUITE 7000"/>		
Address 3:	<input type="text"/>		
City:	<input type="text" value="WASHINGTON"/>	State: <input type="text" value="DC"/>	<input type="text" value="District of Columbia"/>
County:	<input type="text" value="DIST COLUMBIA"/>		
Postal:	<input type="text" value="20009"/>		

D-73

<input type="button" value="OK"/>	<input type="button" value="Cancel"/>
-----------------------------------	---------------------------------------

**Step D-72: Edit Address:** Add details of the Work Address. This is the same process as entering the Home Address in Module D.

**Step D-73:** Click **OK**.





## Module D: Finding or Creating a Person Information Record (Required)

**Work Address**

**Work Address**

Country:  United States

Address: 85 WEST 85TH ST. NW  
SUITE 7000  
WASHINGTON, DC 20009  
DIST COLUMBIA [Edit Address](#)

Geographical Location Code: 110010001

**D-74** Building #:   
Room Number:

**D-75**

**Note:** The information entered on the previous screen will be populated here, and the Geographical Location Code will be auto-populated on screen.

**Step D-74:** (Optional) Enter the **Building #** and **Room Number**.

**Step D-75:** Click **OK**.



## Module D: Finding or Creating a Person Information Record (Required)

[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

[Edit POI Relationship](#) | [Assignment](#)

### Contract

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LincPass Required
1 ABC12345	11	FS	10/20/2011	10/19/2012	Active	09/28/2011		<input type="checkbox"/>

[Detail](#) [Work Address Info](#) [+](#)

[Save](#) [Return to Search](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Edit POI Relationship](#) | [Assignment](#)

**Step D-76:** Click Save. You will see the word Saved in the top right corner of the screen.

This is the end of the data entry process. The record is now ready for sponsorship. The next few screenshots will cover maintaining existing Organizational Relationships and adding new ones.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

Congratulations! You have just learned how to find, enter, and save a Person Information record in Person Model.

The next few screens show you how to Add a New POI Type or Maintain an Organizational Relationship in Person Model. Only a Federal employee, such as a Contracting Officer Representative (COR), may create or edit Person Information records in Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New Person of Interest (POI) Type

The screenshot displays the EMPowerHR web application interface. On the left, a navigation menu is visible with the following items: 'My Favorites', 'Employee Self Service', 'Workforce Administration', 'Non-Employee Processing' (expanded), 'NEIS Reports', 'Person Information', 'Add a New Relationship' (highlighted with a red box and labeled 'E-1'), 'Maintain a Persons Assignment', 'Person Organizational Summary', and 'Contract Company'. The main content area is titled 'US Dept of Agriculture' and 'Add new POI TYPE'. It contains a tab labeled 'Add a New Value' and two input fields: 'EmplID:' and 'Person of Interest Type:'. Both fields have search icons. An 'Add' button is located at the bottom of the form.

**Step E-1:** From the left navigation menu select **Add a New Relationship**. This will direct you to the **Add a new POI TYPE** main menu. From here you can add a new POI type.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New POI Type

The screenshot shows the EMPowerHR interface for the US Dept of Agriculture. On the left is a 'Menu' sidebar with a search bar and a list of options. The 'Add a New Relationship' option is highlighted. The main content area is titled 'Add new POI TYPE' and contains a tab labeled 'Add a New Value'. Below the tab are two input fields: 'EmplID:' and 'Person of Interest Type:'. The 'EmplID:' field is highlighted with a red rectangle and a magnifying glass icon, with a red 'E-2' label to its right. Below these fields is a yellow 'Add' button.

US Dept of Agriculture

EMPOWERHR

Menu

Search:

»

▷ My Favorites

▷ Employee Self Service

▷ Workforce Administration

▽ Non-Employee Processing

▷ NEIS Reports

– [Person Information](#)

– **Add a New Relationship**


– [Maintain a Persons Assignment](#)


– [Person Organizational Summary](#)

– [Contract Company](#)

Add new POI TYPE

Add a New Value

EmplID:   E-2

Person of Interest Type:  

Add

**Step E-2. EmplID:** (Required) Enter the **EmplID** or use the lookup function (magnifying glass) to search by name.





## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New POI Type

The screenshot shows the USDA EMPowerHR system interface. The top header bar is blue with the text "US Dept of Agriculture". Below the header, the "EMPPOWERHR" logo is visible. A "Menu" sidebar on the left contains a search bar and a list of navigation options: "My Favorites", "Employee Self Service", "Workforce Administration", "Non-Employee Processing" (expanded), "NEIS Reports", "Person Information", "Add a New Relationship" (highlighted), "Maintain a Persons Assignment", "Person Organizational Summary", and "Contract Company". The main content area is titled "Add new POI TYPE" and features a tab labeled "Add a New Value". Below the tab, there are two input fields: "EmplID:" with a search icon, and "Person of Interest Type:" with a search icon. The "Person of Interest Type:" field is highlighted with a red rectangle. To the right of this field is the text "E-3". Below the input fields is a yellow "Add" button.

**Step E-3: Person of Interest Type:** (Required) Enter the **Person of Interest (POI)Type** or use the lookup function (magnifying glass) to select the Person of Interest Type.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New Person of Interest (POI) Type

E-4

### Look Up Person of Interest Type

Person of Interest Type:

Description:

[Basic Lookup](#)

### Search Results

View All First 1-5 of 5 Last

Person of Interest Type	Description
<a href="#">00027</a>	<a href="#">Contractor</a>
<a href="#">00028</a>	<a href="#">Annate</a>
<a href="#">00029</a>	<a href="#">Volunteer</a>
<a href="#">00030</a>	<a href="#">Intern</a>
<a href="#">00031</a>	<a href="#">Fellow</a>

**Step E-4:** Select the **Person of Interest Type** to display the type on the Add POI screen.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New POI Type

**Menu**

Search:

- ▷ My Favorites
- ▷ Employee Self Service
- ▷ Workforce Administration
- ▽ Non-Employee Processing
  - ▷ NEIS Reports
  - [Person Information](#)
  - **Add a New Relationship**
  - [Maintain a Persons Assignment](#)
  - [Person Organizational Summary](#)
  - [Contract Company](#)

**Add new POI TYPE**

**Add a New Value**

EmplID:

Person of Interest Type:

**Add** E-5

**DPR: Additional Search fields to be added, such as First and Last Name.**

**DPR: Person of Interest Type to be made a drop-down list.**

**Step E-5. Add:** (Required) Click on the **Add** button to add the new POI Type. You will be directed to the **Add a Person of Interest** screen.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Adding a New POI Type

E-6

Add Person of Interest
Assignment

DEMI LOVATO
Person ID: 255905

Person of Interest Type: Affiliate

Security Data
Find | View All
First 1 of 1 Last

\*Effective Date: 06/07/2011
Get Enabled Security Types

\*Security Access Type
Enabled
Value 1
Value 2

Person of Interest History
Customize | Find |
First 1 of 1 Last

\*Effective Date
\*Organizational Relationship Status
Planned Exit
More Information

1 06/07/2011
A

OK Cancel Apply

Add Person of Interest | Assignment

**Step E-6. Add:** (Required) Follow the same steps described in Module D to assign a new Organizational Relationship.

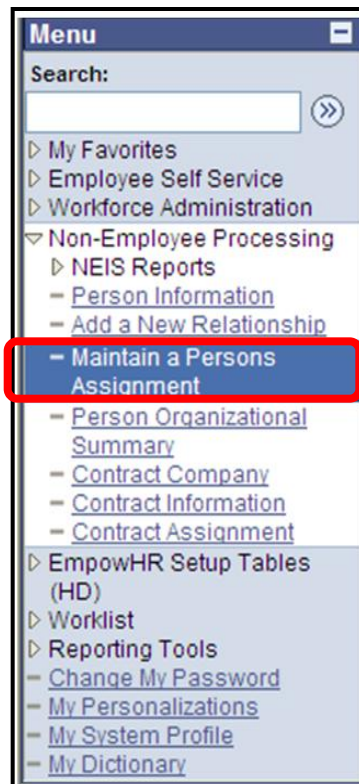
The next few slides will demonstrate how to Maintain a Person's Assignment.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Maintaining a Person's Assignment

E-7



**Step E-7:** From the left navigation menu select **Maintain a Person's Assignment**. This will direct you to the **Maintain POI Types** search screen.





## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Maintaining a Person's Assignment

E-8

**Maintain POI Types**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmpID: begins with

Person of Interest Type: begins with

Name: begins with


Last Name: begins with

Second Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

**E-9**   [Basic Search](#)  [Save Search Criteria](#)

**Step E-8:** Find an existing value by entering the criteria into any of the applicable fields.

**Step E-9:** Click on the **Search** button to initiate the search.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Maintaining a Person's Assignment

E-10

Search Results							
View All							
First 1-2 of 2 Last							
EmplID	Person of Interest Type	Name	Last Name	Second Name	Second Last Name	Alternate Character Name	Middle Name
<a href="#">233812 00027</a>		<a href="#">JOE HARLEY</a>	<a href="#">HARLEY</a>	(blank)	<a href="#">HARLEY</a>	(blank)	(blank)
<a href="#">233812 00028</a>		<a href="#">JOE HARLEY</a>	<a href="#">HARLEY</a>	(blank)	<a href="#">HARLEY</a>	(blank)	(blank)

**Step E-10:** The search results will display at the bottom of the page. Select the relationship you wish to maintain by clicking on the appropriate hyperlink. You will be directed to the **Edit Relationship** tab.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Maintaining a Person's Assignment

Edit POI Relationship **Assignment**

FOZZY BEAR Person ID: 255894

Person of Interest Type: Volunteer

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: 06/06/2011

**\*Security Access** Enabled Value 1 Value 2

Type POI DEPT SetID NOEMP Department AGNEIS

**Person of Interest History** Customize | Find | First 1 of 1 Last

\*Effective Date \*Organizational Relationship Status Planned Exit More Information

1 06/06/2011 A

Save Return to Search Notify Update/Display Include History **Correct History**

Edit POI Relationship | Assignment

**Note:** The Edit POI Relationship screen will default to **Correct History** mode.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Maintaining a Person's Assignment

E-11

Edit POI Relationship **Assignment**

POZZY BEAR Person ID: 255894

Person of Interest Type: Volunteer

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: 06/06/2011

**Security Access** Enabled Value 1 Value 2  
Type

POI DEPT SetID NOEMP Department AGNEIS

**Person of Interest History** Customize | Find First 1 of 1 Last

\*Effective Date \*Organizational Relationship Status Planned Exit More Information

1 06/06/2011 A

**Save** Return to Search Notify Update/Display Include History Correct History

Edit POI Relationship | Assignment

E-12

**Step E-11:** Make any desired edits on this tab or the Assignment tab.

**Step E-12:** Click on the **Save** button.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

### Viewing a Person's Organizational Summary

E-13



**Step E-13:** To view a summary of all Organizational Relationships assigned to a Person, select **Person Organizational Summary**. This will direct you to the search screen.





## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)


### Viewing a Person's Organizational Summary

**E-14**

EmplID:	begins with ▼	255894
Person of Interest Type:	begins with ▼	<input type="text"/>
Name:	begins with ▼	<input type="text"/>
Last Name:	begins with ▼	<input type="text"/>
Second Name:	begins with ▼	<input type="text"/>
Second Last Name:	begins with ▼	<input type="text"/>
Alternate Character Name:	begins with ▼	<input type="text"/>

☐ Include History ☐ Correct History ☐ Case Sensitive

**E-15**

[Basic Search](#)  [Save Search Criteria](#)

**Step E-14:** Search for the Person by entering the criteria into any of the applicable fields.

**Step E-15:** Click on the Search button to initiate the search.



# Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)

## Viewing a Person's Organizational Summary

E-16

Search Results							
View All							
First 1 of 1 Last							
EmplID	Person of Interest Type	Name	Last Name	Second Name	Second Last Name	Alternate Character Name	Middle Name
233812 00027		JOE HARLEY	HARLEY	(blank)	HARLEY	(blank)	(blank)

**Step E-16:** The search results will display at the bottom of the page. Select the Person in order to view the Person's organizational summary. You will be directed to Person's Org Summary.



## Module E: Adding a New POI Type and Maintaining an Organizational Relationship (Required)




### Viewing a Person's Organizational Summary


Person Org Summary


FOZZY BEAR

Person ID: 255894

Person of Interest Instance

Customize   Find    First  1-2 of 2  Last				
Person of Interest Type	Empl rcd#	Status	Begin Date/	End Date
Contractor		Active	06/08/2011	
Volunteer		Active	06/06/2011	

 Return to Search

 Notify

Here you may view the Person's Organizational Relationship Summary.



## Module F: Sponsorship (Required)

Congratulations! You have just learned how to Add and Maintain Organizational Relationships in Person Model.

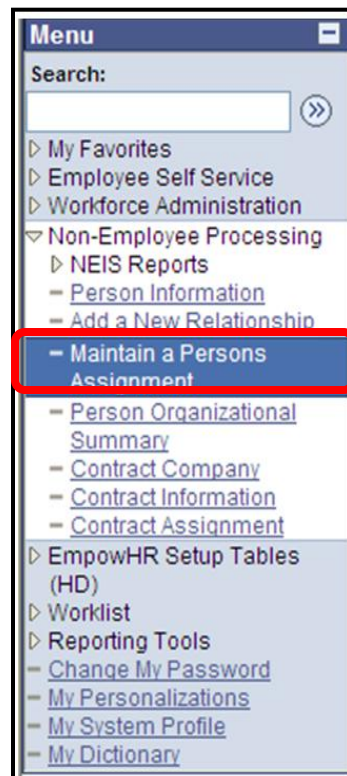
The next few screens show you how to Sponsor a Non-Employee in Person Model. Only a Federal employee may create or edit Organizational Relationship records in Person Model.

You must follow USDA business policy and standards for creating or editing records in Person Model. USDA business policy can be found in the USDA Departmental Regulation (DR) and Departmental Manual (DM) at [http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html).



## Module F: Sponsorship (Required)

F-1



**Step F-1:** From the left navigation menu select “**Maintain a Person’s Assignment**”. This will direct you to the Maintain POI Types search screen.






## Module F: Sponsorship (Required)

F-2

**Maintain POI Types**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Person of Interest Type: begins with  

Name: begins with


Last Name: begins with

Second Name: begins with

Second Last Name: begins with

Alternate Character Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** **Clear** [Basic Search](#)  [Save Search Criteria](#)

F-3

**Step F-2:** Find an existing value by entering the criteria into any of the applicable fields.

**Step F-3:** Click on the **Search** button to initiate the search.



## Module F: Sponsorship (Required)

F-4

Search Results							
View All				First 1-2 of 2 Last			
EmplID	Person of Interest	Type	Name	Last Name	Second Name	Second Last Name	Alternate Character Name Middle Name
<a href="#">233812 00027</a>	<a href="#">JOE HARLEY</a>	<a href="#">HARLEY</a>	(blank)	<a href="#">HARLEY</a>	(blank)	(blank)	(blank)
<a href="#">233812 00028</a>	<a href="#">JOE HARLEY</a>	<a href="#">HARLEY</a>	(blank)	<a href="#">HARLEY</a>	(blank)	(blank)	(blank)

**Step F-4:** The search results will display at the bottom of the page. Select the relationship you wish to maintain by clicking on the appropriate hyperlink. You will be directed to the Edit Relationship tab.



## Module F: Sponsorship (Required)

**F-5**

Edit POI Relationship **Assignment**

FOZZY BEAR Person ID: 255894

Person of Interest Type: Volunteer

**Security Data** Find | View All First 1 of 1 Last

\*Effective Date: 06/06/2011

**\*Security Access** Customize | Find | First 1 of 1 Last

Type	Enabled	Value 1	Value 2
POI DEPT	<input checked="" type="checkbox"/>	SetID NOEMP	Department AGNEIS

**Person of Interest History** Customize | Find | First 1 of 1 Last

*Effective Date	*Organizational Relationship Status	Planned Exit	More Information
1 06/06/2011	A		

Save Return to Search Notify Update/Display Include History Correct History

[Edit POI Relationship | Assignment](#)

**Step F-5.** Click on the **Assignment** tab. This will take you to the Sponsorship screen.



## Module F: Sponsorship (Required)

[New Window](#) | [Help](#) | [Cust](#)

[Edit POI Relationship](#) | [Assignment](#)

### Grant/Agreement

FOZZY BEAR      Person ID: 255894

Person of Interest Type: Volunteer

**F-6**      **F-7**

Grant/Agreement	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date		LincPass Required	Card Shipping In
1 SHOLA GRANT	16	NRCS	05/10/2011	05/24/2011	Active	06/06/2011	Detail	<input checked="" type="checkbox"/>	<a href="#">Card Shipping In</a>

[Save](#) | [Return to Search](#) | [Notify](#) | [Update/Display](#)

[Edit POI Relationship](#) | [Assignment](#)

**Step F-6.** The assignment will already be completed for you. Click on the yellow **Correct History** icon located at the bottom of the screen. Verify that the information is correct and check the **LincPass Required** box.


**Step F-7.** Click on the **Card Shipping Information** hyperlink.



## Module F: Sponsorship (Required)

**Card Shipping Information**

Card Shipping Information

Card Ship Addr Cd:   **F-8**

Card Ship Header

Address Line 1

**Look Up Card Ship Addr Cd**

**Search Results**

[View All](#) First  1-100 of 190  [Last](#)

<u>Office Id ( Orgunit ID)</u>	<u>Address Type</u>	<u>Official Title</u>	<u>Office Symbol</u>
<a href="#">10002</a>	<a href="#">SHP</a>	<a href="#">USDA - Independence Ave</a>	<a href="#">USDA</a>
<a href="#">10004</a>	<a href="#">SHP</a>	<a href="#">USDA - River Road</a>	<a href="#">APHIS</a>
<a href="#">10005</a>	<a href="#">SHP</a>	<a href="#">USDA - Baltimore Ave</a>	<a href="#">USAccess</a>
<a href="#">10010</a>	<a href="#">SHP</a>	<a href="#">DOE - Savannah River</a>	<a href="#">US Dept of Energy/Badge Office</a>

**Step F-8. Card Ship Addr Cd:** Select the magnifying glass lookup feature to find the location where the card is to be shipped. The system will open a new page that displays five columns of data that can be sorted by street address. The address information for the location you choose will be populated (shown on the next slide).





## Module F: Sponsorship (Required)

**Card Shipping Information**

Card Shipping Information

Card Ship Addr Cd:	10005	USDA - Baltimore Ave
Card Ship Header	USAccess	
Address Line 1	10300 Baltimore Ave	
Address Line 2		
City	Beltsville	
State	MD	Postal Code 20705
		Country USA

**F-9**

**Step F-9.** Click the **OK** button to save the information.

**Note:** Now, Contact your Agency Security Officer or Adjudicator to notify them that you have completed sponsorship of Non-Employees for the contract. It is time for the Adjudicator to complete the Person Model adjudication record for the Non-Employees assigned to the contract.



## Module F: Sponsorship (Required)

[New Window](#) | [Help](#) | [Cust](#)

[Edit POI Relationship](#) | [Assignment](#)

### Grant/Agreement

FOZZY BEAR Person ID: 255894

Person of Interest Type: Volunteer

Grant/Agreement	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	LincPass Required
1 SHOLA GRANT	16	NRCS	05/10/2011	05/24/2011	Active	06/06/2011	<input checked="" type="checkbox"/>

[Detail](#) [Card Shipping In](#)

**F-10** [Save](#) [Return to Search](#) [Notify](#) [Update/Display](#)

[Edit POI Relationship](#) | [Assignment](#)

**Step F-10.** Click the **Save** button to save the information.

**Note:** Upon completion, your Sponsor ID will now be attached to the applicant record. To assume sponsorship of records in Person Model, please refer to this screen and click the save icon. To assume sponsorships of records in USAccess, please refer to Module G.



## Non-Employee Record Processing

*Upon completion of sponsorship of records in Person Model:*

- Now the record is ready for Adjudication Information to be entered by the Agency Adjudicator.
- The non-employee will receive an enrollment notification and instructions to schedule their enrollment using the GSA Scheduling Tool (<https://www.schedulemsp.com>). The non-employee should follow instructions in the email to schedule his/her appointment.
- After enrollment and entry of a favorable fingerprint result in Person Model, the LincPass is printed and shipped.
- The non-employee will receive notification via email that the LincPass is ready to be picked up and activated. The non-employee will schedule his/her appointment using the GSA Scheduling Tool.
- The non-employee will pick up and activate his/her own LincPass.





## Sponsor Next Steps

### *Upon completion of sponsorship of records in Person Model:*

- Sponsors and/or Data Entry Personnel should provide the Adjudicator with a list of sponsored Non-Employees who are ready for adjudication in Person Model.
- Sponsors should check the USAccess Applicant Status Report (ASR) to determine LincPass issuance status or potential issues for all sponsored non-employees. Refer to the ASR Guide via the following link on the LincPass website.
- Sponsors may also use the ASR to perform a gap analysis. Refer to the Gap Analysis using the Applicant Status Report Guide on the LincPass website.

**Note:** You must be a designated role holder in USAccess to access the report. Please consult your agency Role Administrator if you require access.







## Person Model Reports

The Person Model Report Service allows system users to check non-employee status to determine where non-employees are in the LincPass sponsorship and adjudication process. The report can also be used to troubleshoot issues with specific non-employee records. All users have access to Person Model reports through the NEIS Reports link.

Search:

- My Favorites
- Employee Self Service
- Workforce Administration
- Non-Employee Processing
  - NEIS Reports**
    - Location Report
    - Non Employee Process
    - Period of Performance Report
    - Summary Report

Main Menu > Non-Employee Processing >

**NEIS Reports**

NEIS Reports

<a href="#">Location Report</a> Location Report	<a href="#">Non Employee Process</a> Non Employee Process	<a href="#">Period of Performance Report</a> Period of Performance Report
<a href="#">Summary Report</a> Summary Report		

New reports include a Location Report, Non-Employee Process Report, Period of Performance Report, and a Summary Report.

Refer to the Person Model Reports Guide on the LincPass Website for detailed instructions on using this new reporting utility.





## Module G: USAccess Sponsorship Actions (Required)

Congratulations! You have just learned how Sponsor non-employees in Person Model.

The next few screens provide an overview of USAccess Sponsorship functions. Only a designated USAccess role holder may perform these actions in USAccess.



## Module G: USAccess Sponsorship Actions (Required)

This section addresses sponsorship activities that must be completed directly in USAccess.

1. Shared Emails
2. LincPass reprints and reissues
3. Re-sending non-employee notifications
4. Sponsor reassignment

Please remember that you must be designated as a Sponsor in USAccess to complete these actions. See slide 8 for details.

**Note:** In USAccess, “Applicant” refers to the non-employee. Although some USAccess training screenshots state “Applicant”, the term “non-employee” has been used throughout the rest of the training.



## Module G: USAccess Sponsorship Actions (Required)

### Login

GSA General Services Administration

Please Log In

User Name \*

Password \*

Login

**Step G-1:** Log into the USAccess Sponsor portal via the following link:

<https://gsa.identitymsp.com/AssuredIdentityPortal>.

**Step G-2:** On the Log In screen, type in your user name in the **User Name** field. Type in your password in the **Password** field and click the **Login** button.

For USAccess password resets, please contact the USAccess Help Desk at 1-866-493-8391.



## Module G: USAccess Sponsorship Actions (Required)

### Applicant Search Page

**Applicant Search**

Search by\*


☒ Lastname ☐ Social Security No.

Lastname

~ or ~

Social Security No.

~ and ~

Birth Date  

[Search](#) [Reset](#) [Sponsor Tools](#)

[Change Password?](#)

**Step G-3:** Select either **Lastname** or **Social Security No.** to search for a non-employee.

**Step G-4:** Type in the non-employee's **Last Name** or **Social Security No.** depending on the **Search By** option selected.

**Step G-5:** Type in the non-employee **Birth Date** or click on the calendar icon next to the **Birth Date** field to select a date from the calendar and click the **Search** button to begin.

**Step G-6:** You will be provided with the search results. Select the appropriate record to continue.



## Module G: USAccess Sponsorship Actions (Required)

### Shared Email Addresses

Some non-employees do not have their own email address. In this situation, data entry personnel or Sponsors are instructed to enter the email for a supervisor or other point of contact in Person Model.

When more than one non-employee shares the same email address, non-employees will not receive automatic enrollment notifications from USAccess upon sponsorship. Action is required by the Sponsor in USAccess to ensure delivery of enrollment notifications to each individual non-employee who share the same email address.

<div>Search Reset Sponsor Tools</div>								
ID	Last Name	First Name	Birth Date	Social Security	Email	Status		
1000121975	DOE	JANE	01/01/1980	XXX-XX-1975	DUSTIN.MILLER@HP.COM	REGISTERED	<a href="#">View Applicant</a>	<a href="#">Edit Sponsorship</a>

**Step G-7:** Make sure the non-employee has a new or active assignment in Person Model. Once completed, the record will be sent to USAccess as Sponsored, with the Employment Status Active ( please allow 24-48 hours for record processing).

**Step G-8:** Log into the USAccess Sponsor Portal, and search for the non-employee per the instructions on slide 125. When the result appears, select **Edit Sponsorship**.



## Module G: USAccess Sponsorship Actions (Required)

### Shared Email Addresses (continued)

**Sponsor Applicant** agencysponsor@tester.aa Logout

NEW TESTER, 1/2/1981 Issuance Criteria Show Applicant Status ●●●●

Sponsorship Information	
Agency *	GENERAL SERVICES ADMINISTRATION
Employee Type *	EMPLOYEE
Agency Rank	
Contract Number	
User Principal Name	<input checked="" type="radio"/> System Generated UPN <input type="radio"/> User Specified
Sub-Agency Abbreviation	
Sub-agency	GENERAL SERVICES ADMINISTRATION
Employee Status *	ACTIVE
Employee ID	
Work Email	Tester@aa.bb.gov
Work Phone	
Agency Person ID	

Card Information	
PIV Card Required	<input checked="" type="radio"/> Yes <input type="radio"/> No
Smart Card Type	STANDARD DUAL INTERFACE
Agency Role	
Card Header	UNITED STATES GOVERNMENT
Require Digital Signature and Encryption Certificates	<input checked="" type="radio"/> Yes <input type="radio"/> No
PIV Card Type	FEDERAL EMPLOYEE
Federal Emergency Response Official	<input type="radio"/> Yes <input checked="" type="radio"/> No
Agency Text	

**Next** **Cancel**

**Note:** If any of the information is incorrect, missing, or needs updating, changes must be made in Person Model and not in USAccess.

**Step G-9:** Verify all required **Biographic Data** fields have current and correct information. Red asterisks (\*) indicate required fields. Sponsor must select **No** for **Require Digital Signature and Encryption Certificates** to ensure sponsorship is successful for non-employees with the same email address. Click **NEXT** to go to the next screen.



## Module G: USAccess Sponsorship Actions (Required)

### Shared Email Addresses (continued)

Sponsor Applicant @fedidcard.gov Logout

Sponsor Info  
Shipping Address  
Save

Click the *Finish* button to save the sponsorship record.

☐ Request Card Reissue/Renewal  
☐ Request Card Reprint

☒ Resend Credential Delivered Email

Destroy PIV Card

Confirmation Required

Are you sure you want to finish?

Previous **Finish** Cancel

Yes No

**Step G-10:** Select **Finish** to save the record. USAccess will ask for a final confirmation. Select **Yes**.

USAccess will direct you back to the **Search Applicant** page. Repeat steps 1-5 for each non-employee who shares an email address with another non-employee.



## Module G: USAccess Sponsorship Actions (Required)

### LincPass Reprints and Reissues

The USAccess Card Action Wizard can be used to reprint or reissue credentials. Use the chart below to determine the appropriate action.

<b>REPRINT REQUEST</b> <b>(Re-enrollment IS NOT required)</b>	<b>REISSUE REQUEST</b> <b>(Re-enrollment IS required)</b>
Request a REPRINT for the following reasons:	Request a REISSUE for the following reasons:
<ul style="list-style-type: none"> <li>• <b>Manufacturer caused defect with credential</b> <ul style="list-style-type: none"> <li>○ Information printed incorrect on the card but is correct in USAccess.</li> <li>○ Defective card, registrar unable to activate</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Name Change to what is printed on the credential</b> <ul style="list-style-type: none"> <li>○ Name change due to marriage or divorce</li> <li>○ Need to add a Suffix</li> <li>○ Need to add a Middle Name</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Change to the employee type</b> <ul style="list-style-type: none"> <li>○ From county to federal</li> <li>○ From contractor to federal</li> <li>○ From federal to contractor</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Biometric Change to what is embedded on the chip</b> <ul style="list-style-type: none"> <li>○ Biometrics printed or embedded electronically on the card are no longer valid.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Damage to credential when delivered</b> <ul style="list-style-type: none"> <li>○ Card is warped, punctured or cracked</li> <li>○ Card is not well put together</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Manufacturing or Process defect that can only be corrected by re-enrolling</b> <ul style="list-style-type: none"> <li>○ Registrar input wrong eye color</li> <li>○ Picture did not render well</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Applicant caused damage</b> <ul style="list-style-type: none"> <li>○ Washed with laundry</li> <li>○ Ran over with car</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Credential expired</b> <ul style="list-style-type: none"> <li>○ Credential's certificate expired</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Change to the Federal Emergency Response Official (FERO) designation</b></li> <li>• <b>Applicant is transferring from another Federal Agency to USDA</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Change in Employment Status</b></li> <li>• <b>Credential is lost or stolen</b></li> </ul>

**NOTE:** Be sure to keep a log of cards that were REPRINTED or REISSUED due to manufacturer defect to ensure that proper reimbursement for the cost of the reprint/reissue is received by the department.



## Module G: USAccess Sponsorship Actions (Required)

### LincPass Reprints and Reissues

Search

Card ActionsSystem NotificationsSponsor Reassignment

Request Card Action

Start

Serial Nbr	Status	Create Date	Card Expiration Date	Destroyed
20505000118013155B47	TERMINATED	12/14/2008 6:44:10 PM	12/14/2013 6:44:10 PM	Destroy

**Step G-11:** First, make sure the non-employee has a new or active assignment in the Person Model. Once completed, the record will be sent to USAccess as **Sponsored**, with the Employment Status **Active** (allow one business day for processing).

**Step G-12:** Log into the USAccess Sponsor Portal, **Search** for the non-employee, then select **Sponsor Utilities**.

**Step G-13:** Click on the **Card Actions** Tab, then click **Start** to launch the Card Action Wizard.



## Module G: USAccess Sponsorship Actions (Required)

### LincPass Reprints and Reissues (continued)

Card Action Request Wizard

The current card is: Active

Does the applicant or an Agency official have the card in possession?

☐ Yes

☐ No

Next Cancel

**Step G-14:** Respond **Yes** or **No** regarding the status of the non-employee's card, then select the **reason** for card action.





## Module G: USAccess Sponsorship Actions (Required)

### LincPass Reprints and Reissues (continued)

**Step G-15:** The Wizard will present the recommended action. You can choose the recommended action or select an **Upgrade Action** from the drop-down list.

**Step G-16:** Select the page to which you want to be directed upon completion, then click **Finish**.

The screenshot shows a web-based wizard titled "Card Action Request Wizard". It has a yellow header bar. The main content area is divided into sections. The first section, "Select An Action", contains the text "The recommended action is" followed by the word "Reissue" in blue. Below this, it says "You can select an Upgrade Action from this list" and shows a drop-down menu with "Reprint", "Reprint", and "Reissue" options. The second section, "On Completion", has two radio button options: "Return to the Applicant Search page" and "Return to the Sponsor Utilities page", with the second option selected. At the bottom, there is a prompt "Please click Finish to complete the request." and three buttons: "Previous", "Finish", and "Cancel".



## Module G: USAccess Sponsorship Actions (Required)

### Resending Applicant Notifications

To resend a system notification (such as a sponsorship email), complete the following steps:

Sponsor Utilities	
<b>Search</b>	
Card Actions <b>System Notifications</b>	
Sponsorship Complete	Resend Email
Credential Ready for Pick Up	Resend Email

**Step G-17:** Log into the USAccess Sponsor Portal, search for the non-employee Applicant, click on **Sponsor Utilities**.

**Step G-18:** Click on **Sponsor Utilities** in the Applicant Search Screen Results.

**Step G-19:** Click on the **System Notification** tab.

**Step G-20:** Select a System Notification and Click on **Resend Email**.



## Module G: USAccess Sponsorship Actions (Required)

### Resending Applicant Notifications

To resend system notifications (continued):

Initial enrollment reminder view

The screenshot shows a web interface with two 'Send Email' buttons at the top. Below them is a yellow banner that reads 'Confirmation Required'. A white dialog box is centered on the screen with the text 'Are you sure you want to resend the Sponsorship Complete email?'. At the bottom right of the dialog box are two buttons: 'Yes' and 'No', both of which are highlighted with a red rectangular border.

Re-enrollment reminder view

The screenshot shows a web interface with two 'Send Email' buttons at the top. Below them is a yellow banner that reads 'Confirmation Required'. A white dialog box is centered on the screen with the text 'Are you sure you want to send the Re-enrollment email?'. At the bottom right of the dialog box are two buttons: 'Yes' and 'No', both of which are highlighted with a red rectangular border.

**Step G-21:** USAccess will ask for a final confirmation. Select **Yes** to send the System Notification.

The system detects whether the non-employee needs to enroll for the first time, or if the non-employee needs to re-enroll. If the Credential has not been printed and inventoried by the pick-up location, the option to send the Ready for Pick up notification is disabled/grayed out.



## Module G: USAccess Sponsorship Actions (Required)

### Sponsor Role Reassignment

When a Sponsor leaves the Agency/Organization or no longer holds the Sponsor role, non-employee records are left without an active Sponsor of Record. The Sponsor Reassignment Tool allows an employee who currently holds the Sponsor role to assume Sponsorship of Records within his or her scope that do not violate the Separation of Duties rule.

Applicant Search

Search by\*

☒ Lastname ☐ Social Security No.

Lastname

~ or ~

Social Security No.

~ and ~

Birth Date

**Step G-22:** Log into the USAccess Sponsor Portal. From the **Applicant Search** page, select **Sponsor Tools** to navigate to the Sponsor Reassignment page.



# Module G: USAccess Sponsorship Actions (Required)

## Sponsor Role Reassignment

Sponsor Tools						
Sponsor Reassignment						
Sponsor List						Back to Search
ID	Sponsor Name	Sub Agency	App. Count	Role Status		
123456	SMITH, JANE		21	SPONSOR	View Applicants	Reassign All
123457	SMITH, JOHN		2	SPONSOR	View Applicants	Reassign All
123458	BROWN, JOE		1	SPONSOR	View Applicants	Reassign All
123459	BROWN, JUDY		1148	SPONSOR	View Applicants	Reassign All

2a

2b

- Step G-23:** Select one of the options below to assume sponsorship of applicants.
- a) To assume sponsorship of all Sponsor's non-employees without viewing the individual records, click **Reassign All**.
  - b) To view the current Sponsor's list of non-employees before assuming sponsorship of all non-employees, click **View Applicants**.





# Module G: USAccess Sponsorship Actions (Required) Sponsor Role Reassignment

**Step G-24:** To reassign individual records, click the check box in the **Reassign column** next to the appropriate applicant record.

**Step G-25:** Click **Reassign Selected** when you have completed your selection and you want to complete the reassignment. Upon completion, your Sponsor ID will now be attached to the applicant record (s) selected for reassignment. To assume sponsorship of records in Person Model, please refer to Module F.

You cannot assume sponsorship for non-employees whose records are marked with an X because of the Separation of Duties rule.

Applicants for CHINA, US

Reassign	ID	Applicant Name	Sub Agency
<input type="checkbox"/>	1000120047	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
<input checked="" type="checkbox"/>	1000120048	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
<input type="checkbox"/>	1000120051	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
X	1000120050	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
<input type="checkbox"/>	1000120044	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
<input checked="" type="checkbox"/>	1000120046	HUNDREDONE, APPLICANT	GENERAL SERVICES ADMINISTRATION
X	1000120161	TRIP, INDIA	GENERAL SERVICES ADMINISTRATION
X	1000120162	TRIP, INDIA	GENERAL SERVICES ADMINISTRATION
X	1000120163	TRIP, INDIA	GENERAL SERVICES ADMINISTRATION
<input type="checkbox"/>	1000120158	TRIP, INDIA	GENERAL SERVICES ADMINISTRATION

1 2 3 4 5 6 7 8 9 10 ...

Reassign Selected

Reassign All



## Resources

For more information on LincPass applicability, please see the USDA Departmental Manual (DM) 4620-002 via the following link:

[http://lincpass.usda.gov/ref\\_lincpass.html](http://lincpass.usda.gov/ref_lincpass.html)

Additional information and training materials on HSPD-12 at USDA can be located at: <http://lincpass.usda.gov/>.

For any additional support about instructions in this guide or issues with records processing, please contact the USDA HSPD-12 Help Desk:

**Toll Free Telephone:** 1-888-212-9309

**Local Telephone:** 703-245-7888

**Email:** [USDAHSPD12help@dm.usda.gov](mailto:USDAHSPD12help@dm.usda.gov)

For technical issues with accessing or generating the USAccess ASR, please contact the USAccess Help Desk at 1-866-493-8391 or [usaccess.helpdesk@hp.com](mailto:usaccess.helpdesk@hp.com).

